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ABSTRACT

The Ontario university system has undergone two separate transformations, structural and economic, from 1972 to 75. The history of this period is primarily the history of these transformations and the way they have affected university-government relations and the role of the Council of Ontario Universities. Major issues of concern during that period have been: (1) new structure and new goals; (2) graduate program planning; (3) academic support--libraries, computers, instructional methodology, and application services. In addition to a discussion of these issues, this document includes a list of projects engaged in by the Research Division of the Council with a brief description of each.

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1972-73 to 1974-75

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new structure
new environment

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Council of Ontario
Universities

review 1972-73 to 1974-75

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de l'Ontario



**new structure
new environment**

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NEW STRUCTURE, NEW ENVIRONMENT

During the past three years, the Ontario university system has undergone two separate but related transformations, structural and economic. The structure of the system was revised following recommendations of the Commission on Post-Secondary Education in Ontario. The Committee on University Affairs, established in 1964, has been replaced (in 1974), as the source of advice to government concerning universities, by the Ontario Council on University Affairs. Concurrently with the discussions which led to the establishment of the new body, the universities entered a new climate of financial austerity. The history of this period is primarily the history of these transformations and the way they have affected university-government relations and the role of the Council of Ontario Universities.

NEW STRUCTURE

The final Report of the Commission on Post-Secondary Education in Ontario was published in December, 1972. The Report, entitled *The Learning Society*, was inevitably an anticlimax. The general thrust of the Commission's thinking had become known through the Draft Report and had not changed in the final Report, though the Commission had done much to clarify its position and moderate some earlier extravagances. Many of the principles promoted in the Report gained the support of the academic community, although the Commission's recommendations were not always readily reconciled with these principles. For example, the Report stressed universal accessibility to the educational system, diversity within the system, flexibility and innovation, and the need for the system to be socially and publicly accountable. Yet, as noted in one of the responses to the Commission's work, "the report remains puzzling in the combination of a cost-holding approach to education with proposals for the expansion of further education that could be very costly".¹

¹ Response to the COPSE Report by the Senate of Carleton University (1973).

The 126 recommendations in the final Report have been the subject of extensive comment and critique by a great many institutions, groups and individuals. The Council of Ontario Universities, having commented at length on the Draft Report, limited itself to a few major matters in responding to the final Report. These included the general issue of the paramount importance of quality in education (as emphasized in a brief addendum to the Report by one of its authors²) and the specific topics of structure of the system, funding, financing of research, student aid, and education for professions.³

Among these areas, the one with which COU was most preoccupied was the question of the structure of the system. The Commission called for the establishment of four essentially parallel agencies responsible to the Ontario Legislature through a Minister of Post-Secondary Education. The four agencies would be the Ontario Council on University Affairs, the Ontario Council for College Affairs, the Ontario Council for the Open Educational Sector, and the Ontario Council for the Creative and Performing Arts. In addition, the Commission proposed an overall Committee on Post-Secondary Education responsible for reviewing and monitoring the system by conducting studies, holding hearings and publishing reports.

The agency of greatest relevance to the universities would be the Ontario Council on University Affairs. This body, according to the recommendation, would be established by legislation, and would have both advisory and executive powers. It would (a) plan and coordinate, in consultation with universities and related voluntary associations, (b) advise the Minister on the global sums needed for the support of the institutions, (c) allocate and distribute operating and capital funds on the basis of an objective formula, and (d) hold public hearings.

The view that the Ontario Council on University Affairs should "plan and coordinate in consultation with universities and related voluntary associations", seemed consistent with an earlier proposal by COU that COU itself should be responsible for the orderly development of plans for graduate studies in the Ontario university system, and that it should advise (OCUA) "in all of the areas where the final determination remains the responsibility of government". The Ontario Council on University Affairs itself could scarcely plan intelligently without the cooperation and participation of the university community, for which COU provides a collective vehicle.

In practical terms, what COU called for was a system in which COU would conduct planning exercises in a systematic way, using the resources of the universities and outside consultants as needed. The planning could be initiated

² J.M.S. Careless

³ *Response to the Report of the Commission on Post-Secondary Education in Ontario* (Toronto: Council of Ontario Universities, 1973).

by COU or in response to requests from the Ontario Council on University Affairs. In either case the procedures should be acceptable to both bodies.

In the view expressed by COU, the Ontario Council on University Affairs should have been made responsible for implementation, as recommended in the Commission's Report. Ideally, it would exercise this responsibility on the basis of planning advice from COU (although it was recognized that OCUA might wish to receive advice on occasion from other sources). Implementation should be achieved by providing funding in such a way as to be consistent with planning — withholding or approving eligibility as the case might be. The advantages of this relationship would have been, first, that the resources of the universities would be brought to bear on collective planning, and second that the universities' representatives on COU would not be placed in the position of conflict where, as members of COU, they would be required themselves to make the executive decisions affecting their institutions.

The proposed relationship was not intended to constrain the freedom of either COU or OCUA to undertake studies on their own initiative; the object of the proposals was to develop a general working relationship which could make the process of consultation meaningful and thorough. It was also noted that where a university disagreed with a collective recommendation, it would be free to make its own recommendations to OCUA, as a matter of course informing COU that it was doing so.

COU therefore strongly supported the terms of reference for the Ontario Council on University Affairs as proposed by the Commission on Post-Secondary Education, on the understanding that the Council would seek systematic planning advice from COU and would work closely with COU in the implementation of plans.

The above position was presented to the Minister of Colleges and Universities in the spring of 1973, but there was little evidence of governmental attention to the issue until the autumn when the Minister indicated that he was preparing to recommend to the government what action should be taken on the matter of structure. This information was coupled with the observation that the Ministry saw inconsistencies between the recommendations of the Committee on Government Productivity and the proposal for an Ontario Council on University Affairs *with some executive powers*. This observation set off a series of discussions with the Minister and other representatives of government aimed at ensuring that the position of the university community was understood. The discussions revolved around the proper role of government and the functions of both the proposed new Council and COU.

In considering the role of government itself, COU's observations were guided by the Report of the Committee on Government Productivity.⁴ The role of govern-

⁴ *Committee on Government Productivity: Interim Reports No. 3 and No. 9* (Toronto: Queen's Printer, 1971).

ment is to set *general policy*. To this end the Report proposed the establishment of a ministry office which would assemble the skills required for policy development within the compass of a small staff working in direct association with the Deputy Minister. Such a ministry office could be helpful but begs the question of the definition of *general policy*. It appeared to be this point which troubled the Ministry. The view expressed by COU was that general policies for the university system embrace three classes:

1. Policies concerning the total sums to be made available for university purposes in competition with governmental priorities in other fields, and post-secondary priorities other than universities.
2. Policies in which the social and political implications are much broader than the concerns of the university system. An example of such an issue could be policy concerning the global number of students for which government is prepared to provide support. Another example could be policy concerning public support of church-related educational institutions.
3. Authorization for major new developments such as a new university, an "open" university of the air, or an expensive new professional school requiring special funding.

The classification may not be complete and was not intended to suggest that the general policies decided by government should be confined. Rather, it was intended to suggest that the general policies decided by government itself should be both *major* and *truly general*.

The Ontario Council on University Affairs, as proposed by the Commission, provided an example of what the Report on Government Productivity described as "a position of independence in relation to partisan politics which is essential for the performance of certain functions of a judicial or quasi-judicial nature".⁵ It is desirable to have the functions of such a Council as clear and free from ambiguity as possible. Likewise, understandings are needed of the proper role of the Ministry. It is however not possible to anticipate all the situations which might arise and therefore whatever the given guidelines, room must exist for interpretation and adjustment to new situations by ready communication between the Minister and the Council. Accordingly, COU suggested that within the framework of government policy, the terms of reference for the Ontario Council on University Affairs could be made more explicit than in the recommendations of the Commission on Post-Secondary Education as follows (changes in italics):

The Council should:

1. *advise the Minister on matters of general policy concerning the universities;*

⁵ *Committee on Government Productivity: Interim Report No. 9* (Toronto: Queen's Printer, 1971) p. 37.

2. plan for the university system, in consultation with universities, related voluntary associations, and *related ministries*;
3. *be empowered to implement plans, within the limits of general governmental policy, by allocating or withholding funding related to plans*;
4. advise the Minister on the global sums needed for the support of institutions and activities within its jurisdiction;
5. *within the limits of general governmental policy*, allocate and distribute operating and capital funds among the universities;
6. publish annual reports tabled in the legislature describing the activities of the Ontario Council on University Affairs;
7. hold public hearings from time to time at the institutions under its jurisdiction.

Such a set of understandings and guidelines, it was thought, could provide for government, the Ontario Council on University Affairs, and the universities a satisfactory and flexible operational framework susceptible to adjustment as the need arose. It would meet the recommendations of the Committee on Government Productivity that "clear policy guidelines for commissions be publicized"⁶ and "that the Government of Ontario continue to use and establish agencies to achieve the special advantages which result from this organizational concept".

It is perhaps remarkable, in the light of earlier sharp disagreements, that as the debate closed the constituencies of the university community were in essential agreement. The proposals put forward by the Commission on Post-Secondary Education giving limited executive powers to a new Ontario Council on University Affairs had the support of the Council of Ontario Universities, the Ontario Confederation of University Faculty Associations, the Ontario Federation of Students, and the universities. Indeed, the support appeared to have a wider base. A seminar on "Ontario and Its Universities", conducted over the winter of 1973-74 by a group of concerned academics from York and the University of Toronto, enlarged by distinguished representatives of the wider Ontario community, resulted in a public statement which included the following words:

We believe that the universities and government should be connected by a highly competent body which can provide advice to government on the development and functioning of the university system and guidelines to the university community as a whole. Such a body should no more be allowed to usurp the government's responsibility for total resource allocation to the universities than it should be permitted to stifle university initiatives in meeting demonstrated needs. But it should be the respected source of advice on such matters as the needs of the universities, the formulae for the allocation of funds, and the establishment of new programmes and new institutions. In its relationship with the universities, this

⁶ *Ibid.*, p. 5.

⁷ *Ibid.*, p. 38.

body should facilitate and encourage cooperation and planning by the Council of Ontario Universities and the Ministry. It should be empowered to require that policies for the system are respected and implemented by the universities. This power could best be exercised if the proposed commission had the authority to allocate funds among the universities. For the most part, such allocation should be on the basis of some objective formula acceptable to government and the universities, but the commission would need limited discretionary power to make modest changes in the application of the formula.⁸

It must be said that COU was given the opportunity to make its case. Nevertheless, when the government announced its decision in draft legislation it was immediately clear that the debate had been lost. The government decided to replace the Committee on University Affairs by a new body, the Ontario Council on University Affairs, but chose to make the powers of the new body strictly advisory. It was to be empowered "to make recommendations to the Minister on any matter that, in the opinion of the Council, concerns one or more Ontario post-secondary degree-granting institutions, a post-secondary educational institution, other than [the above], designated by the Lieutenant Governor in Council, students registered in [such] institutions; to make recommendations in respect of any matter referred to it by the Minister".

Other than the change in name, the terms of the draft legislation seem almost indistinguishable from those incorporated in the Order-in-Council establishing the now defunct Committee on University Affairs. In announcing the new body, however, the government's stated intention was to strengthen the "buffer" between universities and government. It is to be hoped that in practice both the new body and the Ministry will, in fact, strive for that objective. The appointment of Dr. Stefan Dupré, as Chairman, and a broadly representative Council of some twenty persons gave cause for encouragement.

During its first year of existence the careful selection of priorities for the new Council's attention, the thoroughness of its consultation with the Council of Ontario Universities and the individual institutions, its concern for guarding its own independence, and the analytical acumen expressed in its publicly-released advisory memoranda, were all a source of further encouragement.

NEW ENVIRONMENT*

In Ontario, the government and the universities were partners in an expansion during the sixties which brought about the creation of new univer-

* "Ontario and Its Universities" (*Globe & Mail*, February 18, 1974), p. 7.

* The text of this section draws on the work of a Special Committee to Assess University Policies and Plans, chaired by R. Guindon, Vice-chairman, Council of Ontario Universities and Rector, University of Ottawa.

sities and the expansion of established ones. Many new programmes were initiated, and a fourfold increase in enrolment was accommodated. The universities have substantially improved the existing undergraduate and graduate programmes and developed new ones; some of these programmes have reached international standards and reputation. This has been done primarily through the contribution of thousands of faculty members who have been recruited by the Ontario universities, from non-Ontario university staffs or graduate students, as well as from within the Ontario system. The universities have managed effectively to deal with unprecedented growth; they have maintained and improved academic quality; they have expanded and enriched the range of opportunities for the people of Ontario; they have honoured the objective of improving accessibility to university education; they have consulted and cooperated with each other and with the government of Ontario; they have introduced greater openness into the conduct of their affairs.

While there is still much room for improvement, the citizens and the government of Ontario have a right to be proud of what has been accomplished through the generous contribution of public funds, federal as well as provincial.

No one questions the fact that the increases in student numbers and in public funds could and should not be maintained indefinitely at the rate of the sixties. This has become more and more clear as the strains on provincial finances have increased, and the clamour for scarce resources has become louder. But the end of the unprecedented period of growth came upon the universities shortly after the turn of the decade in a sudden and unexpected fashion. The rate of increase in enrolment dropped dramatically and, at the same time, the basic income unit (BIU) value (which represents unit costs) was increased substantially less than the rate of inflation. Each year, from 1972-73 through 1975-76, the BIU has increased by values several percentage points below inflationary cost increases, revealing the perceptions of policy-makers that the universities could withstand a reduction in the level of funding without detrimental consequences.¹⁰

The cumulative effects of these annual decisions of the provincial government (along with limitations on cost-sharing amounts from the federal government) have now brought the universities to the moment of truth at which they must seriously consider whether they can afford to continue to pursue existing goals, which have guided the universities in seeking to meet the needs articulated by society. It should be stressed that these goals, while perhaps not always fully understood, have never been seriously challenged either by the public or by the government.

¹⁰ The recent announcement of grants to universities for 1976-77 signals a recognition by government that the constraints of the past four years have been severe. Though the relief is welcome, the basic situation (that is, BIU value increases which are significantly less than inflation) remains unchanged, and universities continue to face a financial future which cannot be reconciled with existing goals.

The question has been raised, "What does the government want?" The clearest formal statement of funding objectives was that made by the Minister of Colleges and Universities in a statement to the legislature on November 18, 1974 concerning grants for 1975-76. The operating support to universities was said to be "sufficient to offset inflationary trends, to maintain and improve existing levels of service, and to accommodate predicted enrolment increases". This straightforward statement was challenged by both the Ontario Council on University Affairs and the Council of Ontario Universities, both of which stated firmly that the funds provided by the government for 1975-76 were insufficient to meet the stated objectives.

This dispute over the adequacy of funding to meet the government's stated objectives should be viewed against the background of various government actions and statements over the past several years. The debate was joined forcefully by a previous Minister of Colleges and Universities who gave currency to the phrase "more scholar for the dollar". The Premier, the Minister, and the Ministry officials have made a number of statements which could be summarized as follows:

1. The government cannot afford to support the current large university system at a level which will permit universities to continue their traditional practices in the same way they did in the past.
2. The government is seeking improvements in "productivity" and its index of productivity is the student/faculty ratio.
3. The government will maintain a policy of accessibility for qualified students but wishes to see a more rigorous interpretation of "qualified".
4. The government is unwilling to expand those universities which have reached capacity and where there is still pressure for growth, the government would welcome a steering of students to institutions with unused physical capacity.
5. The government believes that there is an undesirable level of duplication of programmes among the universities.
6. The government is expecting a greater level of system-wide planning and coordination.

In summarizing the government's objectives, we do not imply that all of them are appropriate or representative of sound policy. COU recognizes, of course, that the government must determine the level of support which it is prepared to provide. This level however has not been sufficient in the past few years to meet the universities' legitimate needs given the continuing commitment to accessibility and quality. A reconciliation of the government's objectives and its ability to support universities is needed.

The Goals of the Universities

The debate centres around "productivity", a term often used in its most superficial sense. Discussions about this concept cannot be meaningful unless there is a full understanding of what the products are and of what process is necessary to create the products. Arguments based exclusively on such variables as "class-size" or "contact hours" or even the "faculty/student ratio" narrow the focus so much that only one part of the whole is seen.

Much has been written about "future shock" and the post-industrial revolution. The universities, in one of the paradoxes of the seventies, have become a victim of "future shock". Too much was expected of the universities in the fifties and sixties and too little is expected of them now. If the universities would simply provide more places at lower cost to broaden accessibility and enhance social mobility, it is assumed by some that all would be well. In fact, if the universities are to meet their responsibilities, accessibility as a social goal must be only one part of their agenda, albeit an important one.

Teaching at the university level is not only a process of transmitting acquired knowledge and skills. It is a joint pursuit of knowledge in which the teacher and the student are both engaged. It is this emphasis on scholarship which makes teaching at the university level fundamentally different from that at the primary and secondary levels. University education cannot be considered as just another layer of public education. It is neither better nor worse; it is different. It presupposes public education and builds on it. The universities seek to create for society a group of broadly educated, questioning, creative citizens; to raise the level of critical functioning in society by developing powers of judgment; and to serve as a humanizing and civilizing force by fostering the aesthetic and moral, as well as the intellectual faculties. It is in this wide sense that university teaching must be understood. If student through-put at the expense of scholarship is forced upon the system, society will be the loser.

It should be underlined that what makes mass higher education with broad accessibility such a significant step forward is precisely that the qualities of education deriving from scholarship can be made available much more widely than ever before. If these qualities are downgraded, this enormous gain will be lost.

Society faces staggering problems in the remainder of the century. They are concerned with energy, resource management, population growth, food shortages, pollution control, steady state economies, international relations and many others. Most of them are both world problems and problems for Canada and Ontario. All of them are characterized by a new order of complexity and interrelatedness. They are multidisciplinary on a grand scale. How is society to deal with them? Where are the new specialized skills, the new generalist capabilities, the new organizational models that must be brought into being if

they are to be dealt with successfully? Where is the sense of urgency that appreciates the shortness of the lead time on many of the most critical issues? None of these problems can be addressed successfully without the help of the universities, and the universities are unlikely to rise to the occasion if they are themselves spending too much of their time and energies preoccupied with financial survival.

The energies of the universities for the next twenty years need to be transformed from a concern for growth to cope with numbers, to one of innovation in response to the new dilemmas of society. The missions of the university are unchanged — to teach, to learn, to serve; but the successful accomplishment of the missions will require enormous energies, flexibility and creativity in the coming years. How shall students be taught? What shall they be taught? How can specialists work more effectively on transdisciplinary problems? How can individual freedom and collective responsibility be mutually served? How can research be organized to address the larger issues? How can the universities work more closely with governments, with the professions and with business and labour, and at the same time maintain enough of an arm's-length relationship that they do not lose their independence of thought and action? All of these are questions with vast consequences for society. They are the real priorities of today for tomorrow, and it will be a tragedy if they are ignored and the opportunities are lost through unwillingness to meet their costs, because of a narrow view of universities which sees only student/staff ratios as the measure of productivity.

Likewise the commitment of universities to external service to the community is a very important, time-consuming call on the resources of the institutions. The service which is provided to governments at all levels, to business (both management and labour), to the arts and to the general public is very large. Most sophisticated tasks facing society need the skills and knowledge of highly qualified specialists whose home is in the universities. All of these activities represent "products" of the university enterprise. Any discussion of productivity must place a realistic value on these "products", only a small portion of which are accompanied by supplementary financial compensation.

These are long-run concerns which can all too easily be lost sight of in difficult financial times. Both the universities and government need to recognize this. At present, the universities find themselves in the Alice-in-Wonderland situation of having to run ever faster in an attempt just to stay where they are. As in other areas of society, there has been increasing talk in the universities of the "steady state". This term has the unfortunate connotation of preserving the status quo. Major redirections of efforts will be needed to cope with issues such as enumerated above. To take another example, concerns about accessibility have been redirected from the massive growth in numbers which characterized the sixties to the provision of new opportunities for various groups within society which have not benefited proportionately from the enormous increase in

university accessibility: women (in some programmes), native peoples, the elderly, and the historically disadvantaged socio-economic groups. The universities are conscious of these needs, and have done much to meet them, but if mere survival becomes of necessity the overriding concern, the many varied and changing needs of society cannot be met.

New Questions

All of these concerns raise a host of questions for the system of universities in Ontario; questions which for the most part remain to be answered.

The government of Ontario believes that it must limit the size of grants to the universities. At the same time it has for many years been committed to a policy of providing access to universities for all qualified students. If enrolments continue to grow (and the recent "slow-down" appears to have ended with enrolments for 1975-76 showing an increase of 5.4% over 1974), and funding is limited to amounts insufficient to offset inflation and meet the requirements of growth, quality will suffer. The average annual total increase in operating grants, to cover both inflation and growth, between 1970-71 and 1973-74 (8.9%) was only 1.4 percentage points greater than the average rate of inflation (7.5%). During that period, the average growth in full-time equivalent enrolment was 7.5%.¹¹ The universities cannot possibly accommodate to such large discrepancies between growth and funding without serious dilution of quality. Will the government face this situation openly if the limitation on funding is inevitable? The choice is to either limit the rate of growth to that which can be managed, or to accept a degradation of quality. Will the government choose quantity or quality?

Questions arise also in relation to the role of the Ontario Council on University Affairs. Does the Council perceive clearly the extent to which the present circumstances threaten the integrity and the future prospects of the universities? On its brief record it can be assumed that the perceptions of the Council are accurate.¹² Can the Council, through its advice, persuade the government that current funding patterns are insufficient to achieve the government's stated goals? In the event that the government determines that the grants cannot meet the objectives, can the Council persuade the government to modify the objectives in ways which will preserve quality?

¹¹ Calculated from full-time equivalent enrolment figures shown in *Report of the Ministry of University Affairs of Ontario, 1970-71*, p. 65, and *Ministry of Colleges and Universities, Statistical Summary, 1972-73/1973-74*, pp. 34 and 41.

¹² *Annual Report, Ontario Council on University Affairs, 1974-75*.

The Ontario Council on University Affairs must deal also with the fact that some universities receive supplementary grants beyond the income derived from the formula. Are these supplements justified? What advice will the Council offer to the Minister? The credibility of the Council with both government and universities, and hence the value of the Council to the system, will hinge on the quality and wisdom of its advice on these two issues — the levels of support for the system and the question of supplementary grants.

The Council of Ontario Universities recognizes that it too must address a range of questions arising because of the new environment. For this reason the Council established a Special Committee to assess the goals, policies and plans of the Ontario university system for the remainder of the 1970's and the 1980's in the light of the competing governmental priorities, possible financial prospects, and the anticipated numbers of qualified students. The Committee has exposed a preliminary "green paper" for discussion in the universities. It sets out the Committee's proposals in response to the following questions: How can the government, the Ontario Council on University Affairs, and the universities work together towards the elaboration of individual and collective objectives? How can the financial needs for achieving agreed goals be properly determined? Should maintenance of quality be the overriding priority? If, indeed, maintaining quality is to be the priority, what are the implications for revision of the operating grants formula for the next three years? Should tuition fees assessed by the universities be independent of the operating grants formula and what proportion of total costs should be covered by tuition fees? Are current admission policies, both undergraduate and graduate, serving the best interests of students and the province? What is the present enrolment capacity of individual universities and the system? Is there at the graduate level unnecessary and costly duplication of programmes? Are there opportunities for worthwhile cooperative activities in addition to those already conducted under the auspices of the Council of Ontario Universities? How can innovation be encouraged in a period of financial constraint?

It is premature to predict how all of these questions will be answered. Suffice it to say at this time that the Committee has expressed a firm conviction that maintenance of quality should be the top priority. The Committee intends to submit its report to the Council at the beginning of 1976, after having reviewed responses to its "green paper".

Finally, the universities are asking themselves some fundamental questions. Tormented by inflation and austerity, can they yet manage to focus on the issues of purpose and performance? Will they instead be preoccupied with the machinery of formal collective bargaining and its enormous consequences for the future of universities which, as yet, can be seen only through a glass darkly? At the moment, two Ontario universities are in the early stages of formal bargaining under the labour relations legislation. Concurrently, the university

presidents and the Ontario Confederation of University Faculty Associations, through a joint committee, have explored a proposal for provincial negotiation of faculty salary scales and numbers. This proposal, however, did not gain general acceptance. Whatever the final outcome of such discussions and campus-based collective bargaining activities, it takes little imagination to see that these questions have profound implications for the future of Ontario universities.

Obviously the times are turbulent and troubled for universities, as they are for society itself. Powerful forces have been unleashed by the massive educational developments of the last fifteen years. Where these forces, sometimes working at cross-purposes, will lead remains unpredictable. The central question is whether the universities and the government will have the vision and the will to preserve the university as a source of scholarship, a place where students and professors together can seek truth without fear or favour.

GRADUATE PROGRAMME PLANNING

There is a wide range of areas in which the universities of Ontario have found it profitable to cooperate. The most challenging of these engaged to date has been the design and implementation of a process of planning for the orderly development of graduate studies. Over the past three years, the aspect of COU activities most visible on the various campuses has been the activity of the Advisory Committee on Academic Planning. The results of this activity have consumed a major portion of the Council agenda. Over the period, 20 major planning studies in various disciplines have been completed. The direct costs in the COU budget will have totalled one million dollars by the end of 1975-76. All of this represents a process of self-evaluation and self-regulation by the university community of major scope and significance.

THE BACKDROP OF THE ACAP EXERCISE

The cooperative planning under the aegis of the Advisory Committee on Academic Planning was an outgrowth of a 1966 study of the development of graduate programmes in Ontario universities. Two of the chief concerns underlying much of the resulting report¹ (known as the Spinks Report) were the development of excellence and the effective utilization of resources.

To deal with the matter of excellence, the Ontario Council on Graduate Studies (comprised of the deans of graduate studies of the member universities of COU) established an Appraisals Committee and procedures to ensure for all new graduate programmes a careful scrutiny of all factors affecting academic quality. The system has worked well and in addition to its positive effect on quality, it has undoubtedly had a moderating effect on the proliferation of graduate programmes in the province. It is also frequently used, on request of individual universities, for appraisal of existing programmes. Activities of the Appraisals Committee over the past six years are summarized in Appendix G. A full description of the appraisal process is given in the publication *The First Three Years of Appraisals of Graduate Programmes (1970)*.²

¹ *Report of the Commission to Study the Development of Graduate Programmes in Ontario Universities* (also known as the Spinks Report) (Toronto: University of Toronto Press, 1966).

² Toronto: Committee of Presidents of Universities of Ontario, 1970.

The Spinks report had also drawn attention to the very real need for planning and for increased interuniversity consultation, not only at the level of the graduate deans, but also within the individual disciplines and professions. In 1968, the Advisory Committee on Academic Planning (ACAP) was formed to guide the development of provincial discipline groups and to coordinate the work of rationalizing graduate studies in the province. ACAP has a minimum of seven members who are appointed as individuals (not university representatives) from the professoriate of the Ontario universities. Every effort is made to maintain a balanced distribution among the universities and disciplines represented. Each discipline group consists of one representative from each university, appointed by the president from among the academic staff actively engaged in the relevant programmes and having some knowledge of the under-graduate operation.

The planning exercise was given further impetus in 1971 when the Ministry of Colleges and Universities placed a general embargo on funding of all new graduate programmes. This embargo was later modified to include only disciplines in which the overall impact of individual three-year plans required of the older "emerged" universities and five-year plans required of the newer "emerging" universities indicated potentially serious levels of duplication. The embargo was further modified to exclude master's programmes in fourteen central disciplines for the emerged universities. As a result there was produced a list of sixteen embargoed disciplines in which funding was denied for new doctoral programmes at any of the universities, for all new master's programmes at the emerging universities, and for some new master's programmes at the emerged universities.

Modifications to the embargo list occur in two ways.

1. ACAP was given the task of conducting, for each embargoed discipline, a province-wide "planning assessment" which would serve as the basis for the preparation by COU of a provincial plan for the particular discipline. Acceptance of such a plan by the Ministry was adopted as the key to lifting of the embargo for that discipline.
2. Also, proposed revisions to the universities' individual plans are reviewed each year by ACAP and must be approved by COU and the Ministry. Their collective impact on each discipline is assessed and serves as the basis for an annual review of the embargo list.

Later developments led to the introduction of a provisional embargo to be imposed when good planning indicated the need for some limited study by ACAP on a scale much smaller than is required for a regular planning assessment.

The operations of appraisal of individual university programmes (for quality) and assessment of a discipline across the province (for planning) are performed

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separately and independently, although frequently decisions about one may bear on the other. The funding of a new programme, for example, requires that:

1. it fall into a category that is free of embargo;
2. it form a part of the approved plan of the proposing university; and that
3. it receive a favourable appraisal.

THE ASSESSMENT PROCESS

The conduct of a planning assessment begins with the appointment of the relevant discipline group, which then works with ACAP to define the precise academic boundaries of the study, the procedures to be used, and terms of reference for a small team of consultants. The discipline group recommends a list of consultants from which ACAP selects two or three leaders within the field but from outside Ontario, and one senior Canadian academic from another field.

The consultants are provided with background material such as terms of reference and procedures, and with statistical and other relevant information requested by ACAP from the universities, e.g., past and current levels of graduate activities in the discipline and plans for the next five years. All of the university documentation is provided by the graduate dean's office and must, in the case of future plans, be accompanied by an indication from the chief executive of the extent to which the university supports the plans.

The consultants are briefed in person on the objectives and the nature of the exercise. A meeting of the consultants with the discipline group is then organized to allow a review of the data provided and to permit clarification or emphasis of specific points. Visits by the consultants to the universities provide for discussions with graduate students, post-doctoral fellows, members of faculty, the departmental chairmen and senior university officials, and for examination of library and laboratory facilities. A draft report is then prepared by the consultants and circulated to ACAP and the discipline group. The chairman of ACAP checks that the procedures have been followed and the terms of reference satisfied. A final meeting with the discipline group provides its members with an opportunity to challenge and correct, if necessary, the factual content of the report and to react to the judgments and recommendations of the consultants. A final report is then prepared and distributed to ACAP, the discipline group, and the universities.

Based on a study of the consultants' report and of written comments on it received from the discipline group and the universities, an ACAP report is prepared and circulated together with the consultants' report and comments to COU and OCGS. Further comments are prepared by OCGS, following which COU examines all of the material and prepares its report and a series of recommendations. Complete documentation from procedures and terms of

reference through to the COU recommendations, is then published under a series entitled *Perspectives and Plans for Graduate Studies*. This report is sent to the Ontario Council on University Affairs with the recommendation that the embargo on the "assessed" discipline be lifted.

Acceptance of the report by the Ministry, on the recommendation of OCUA, opens the door to possible funding of new programmes. Further details of the planning assessment process are given in Chapter 2 of *Stimulus and Response: Sixth Annual Review, 1971-72*.¹

Costs of the planning assessment programme, originally shared equally between the universities and the government, have now been shifted entirely to the universities.

Since its inception in 1968, ACAP has completed full planning assessments and made recommendations concerning development of graduate studies in twenty disciplines. It is currently involved in a major assessment covering all of mathematics, including computer science. Planning assessments completed or underway are listed in Appendix H, along with other smaller studies undertaken under the auspices of ACAP.

The planning assessment reports have contained many different types of recommendations, since the various disciplines are in different stages of development, and since there is a great variety of departmental situations in the province. Some recommendations were directed to the redesign of graduate programmes in recognition of students' changing career goals, some addressed matters of research as distinct from graduate work, some called for the commencement of needed or justifiable new programmes, some recommended that proposed new programmes not begin, and some called for the suspension or curtailment of existing programmes. On the question of quality, some recommendations called for strengthening of existing programmes, and some called for further review of programme quality through the appraisal process.

The recommendations of each COU assessment report constitute a system plan for graduate work in the discipline, indicating an agreed role for each department in the province. The COU Report, usually very close to the ACAP Report in its recommendations, represents the collective opinion of the Ontario universities as to the desirable development of graduate work in the subject.

Since the assessments will be a major determinant of the development of graduate programmes in the province for some time, it is worth reviewing the principles on which recommendations are based.

¹ Toronto: Council of Ontario Universities, 1972.

THE PLANNING PRINCIPLES ADOPTED BY COU

When the early completed planning assessments came before the Council in the form of reports from ACAP, a number of controversial issues arose. Although there had been an attempt to carefully spell out what was expected of each planning study by means of the terms of reference given to consultants, it soon became apparent that the approach which should be taken to setting forth a development plan for graduate studies required extensive study and debate. Thus, the Council spent many hours during its review of the first assessment reports in lively debate over the principles upon which judgments should be based. This ultimately led to a statement of planning principles which is incorporated in the COU report on each discipline.

An example of the difficulties faced by COU in dealing with assessment reports, is the determination of how much emphasis should be given to manpower needs in planning the scale of graduate work in a given discipline. There is a not uncommon belief that the enrolment in various subjects in the universities should be related to employment prospects. Experience, however, shows that only in exceptional cases can an estimate of future manpower needs be made with sufficient reliability to be of any use in this connection. At the doctoral level one would need to estimate an employment market five to ten years in the future — a market moreover which would contain various types of employment in the industrial, governmental, business and academic sectors. There is also the fact of the high interchangeability of employment for persons trained in the various disciplines; this is particularly significant at the master's level. On the other hand, demographic knowledge makes it possible to obtain rough, but reasonably reliable, estimates of the future demands for graduate study by Canadian applicants of high quality. ACAP was therefore instructed to advise COU whether the plans of the universities appear to be consistent with the likely number of suitable applicants, and also to consider if a reasonable estimate of need can be made. It would be only if the enrolments being planned by universities were grossly out of line with reliable evidence that COU would make corrective recommendations on either of these considerations.

Since a key feature of a system plan for graduate work is the recognition of differentiated roles for the various departments, it is of central importance that the plan be based on objective judgments of academic quality. The method has been to rely on the judgments of highly qualified independent consultants.

One aspect of quality which became a matter of some contention is the so-called minimum "critical size" of enrolment. The focus of this debate was not financial viability but academic breadth and strength in relation to the requirements of adequate training for students. After lengthy discussion, COU arrived at the following position:

The Planning Principles Adopted by COU

The quality of graduate programmes is partly dependent on size, and for each programme, depending on how it is designed and its scope, there is a minimum size of enrolment below which quality may suffer. That number cannot be expressed for the discipline as a whole but only for individual programmes depending on their purpose, their resources *and their design*.

This statement is intended to take into account the need for a graduate student to interact with other students (or post-doctoral fellows) in seminars, colloquia and the daily informal discussion and argument which is an essential aspect of research and advanced learning.

When an ACAP assessment finds that a programme is of questionable quality any one of a number of recommendations may be made. (It is emphasized that the definitive judgment as to whether or not an individual programme is of sufficiently high standard rests with the Appraisals Committee, since ACAP does not examine programmes in the same detail and with the same procedural safeguards, as the Appraisals Committee.) Consequently, when academic standards have been called into question by a planning assessment, one must decide how important the programme appears to be in the spectrum of graduate offerings of the universities in the system. If it appears not to be a crucial component, the recommendation to the university will be to discontinue the programme, unless evidence is available that it is a critical element in the pattern of graduate activity within the university. If the university disagrees with the quality judgment, it may submit the programme for appraisal, but in such cases universities have been frequently advised that there would be no justification for them to commit additional resources in order to pass the appraisal. On the other hand, if the programme seems necessary for the province, the recommendation is usually to strengthen it, with an appraisal following this action in order to confirm its quality.

In several of the disciplines that have been studied, it appeared that all of the likely future students could be accommodated in a substantially smaller number of PhD programmes than were offered. Should one then continue only the two, three or four programmes which appear to be of the highest quality and which offer adequate breadth of fields? COU has chosen not to follow this course. It has identified these few departments and has categorized their PhD programmes as general. It has, however, taken the view that there are minimal advantages and substantial disadvantages in discontinuing the programmes not so identified. This is because the resources (particularly good research professors) are already deployed, and very little financial saving could be effected by cancelling the programme. On the other hand, the presence of doctoral students enriches the intellectual life of the campus, which can have a beneficial effect on the undergraduate offerings. As a result of these considerations, COU frequently recommends the continuance of doctoral work in the form of "specialized" programmes as a means of utilizing the particular

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strengths of certain universities in some specialties. These programmes are limited to only a very few fields in which the department has particular expertise. Specialized programmes are small in terms of enrolment, and must be of the same academic quality (but not scope) as the approved general programmes. It is also contemplated that, occasionally, new specialized PhD programmes might be established in response to specific recognized needs, clearly demonstrated. Such occasions have not yet arisen.

It is important that departments without doctoral programmes, or with highly specialized ones, have teaching staff who are active in research. There will not, otherwise, be good teaching of undergraduates. In some disciplines, staff research is facilitated by the collaboration of advanced students. When graduate students are not available, there should be compensating resources for the teaching staff who are productive in research. COU has recognized this as a very important feature of university programme rationalization, and has exhorted the universities and OCUA to give it urgent attention.

The process by which COU arrived at the various positions that have just been described was contentious, painstaking, and at times, painful. The debate often focused on the extent of the autonomy of a university. In 1966, in the wake of the Spinks Report, the Committee of Presidents (predecessor to COU) had rejected two extreme positions in connection with graduate work. It rejected complete individual university autonomy on one hand and a centralized graduate school for the province on the other. The result of uncoordinated development would have been uniform mediocrity since human resources are scarce. A centralized structure would unduly hamper local initiative and tend to delay improvements in the offerings available to the students in the province. Instead, the universities established the Ontario Council on Graduate Studies, charged by its constitution with the duty to advise COU on the planning and development of an orderly pattern of graduate education and research in the universities, having regard, among other things, to the need to avoid unnecessary duplication of programmes and facilities. In the course of the debate in the last three years, COU has essentially reaffirmed this position of collective autonomy, and has formally agreed that, while each university retains the freedom and responsibility to plan and implement its own academic development, the universities in embarking on a cooperative planning process have signalled their intentions of cooperating with the COU recommendations. Universities are expected to notify COU if they intend to depart from the COU report.

When the planning assessments began in 1971, few universities had detailed and comprehensive forward plans for the development of graduate work. This situation has changed noticeably, and the planning assessments have led the universities to conduct re-examinations of their graduate offerings. In particular, a university is likely to look at its offerings in departmental groupings of mutually supporting disciplines, e.g., the social sciences. If this perspective

should lead a university to the conclusion that one of the COU recommendations affecting it should be altered, it is encouraged to make its case to COU, which will consider revision of the provincial plan. This has not yet occurred.

This is just one instance of the fact that the system plans must be kept under continuing review. In this process, annual reports by discipline groups will be central. These groups are charged to work under the guidance of ACAP to oversee the continuing health of the graduate work in their subjects in the province. Annual reports should keep OCGS aware of the need to initiate any further reviews or reassessments.

IMPLEMENTATION OF PLANS

In each case wherein the Minister has lifted the embargo on a discipline following completion of a planning assessment, this has been done subject to the understanding that COU would monitor implementation of the plan. In accepting this obligation, COU has defined monitoring as reporting to the Minister, through the Ontario Council on University Affairs, on the implementation of plans.

The first annual report to the Minister has been completed at the time of writing this report. It is most encouraging to observe the very considerable extent to which the recommendations have already been implemented, and the absence of significant deviations from the agreed plans. One of the consequences of system planning is made very evident in this first report, namely extensive interuniversity cooperation, in sharing course offerings, organizing joint programmes, cross-appointing professors, sharing experimental equipment, etc.

NEW CONTEXT

The process of graduate planning has been cast into a new context with the issuance by the Ontario Council of University Affairs in July and December, 1975, of advisory memoranda on the subject, and the responses of the Minister thereto. In its memoranda, OCUA saw the accomplishments of the planning process to date as highly positive, particularly in the ensurance of high-quality graduate work in the province. OCUA acknowledged that COU had been engaged in a demanding and difficult process and commended the university community for the thoroughness with which it had been conducted. OCUA observed, however, that one important dimension was missing from the exercise, that is, consideration of the financial implications of graduate planning. The point made was that during a period when resources were becoming increasingly scarce, difficult choices might have to be made, out of a concern for the overall health of the universities. A rational plan could not be determined apart from this perspective. For instance, if available professorial time is insufficient, expansion of graduate programmes should not occur at the expense of undergraduate instruction.

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OCUA stated its intention of henceforth reviewing COU recommendations on development of graduate programmes only once a year in a package, and specified that such reports should contain an examination of the financial consequences of the recommendations. In his letter responding to the July OCUA memorandum, the Minister underlined this aspect, stating his view that the exercise to date, while commendable as far as it had gone, had not adequately rationalized graduate education in the province. He therefore indicated that funding for the new graduate programmes in assessed disciplines would be deferred pending recommendation from OCUA on the financial aspects. COU is presently considering the approach to be taken in responding to these concerns for the financial implications of graduate planning.

The concern over the financial implications of graduate planning was taken one step further in the OCUA memorandum released in December, 1975. The Minister accepted an OCUA recommendation that the operating grants formula be suspended for the funding of graduate work in 1976-77 and 1977-78 in favour of grants to institutions that will be totally insensitive to changes in enrolment levels. Amongst the reasons given for this recommendation was the desire of OCUA to foster an atmosphere in which planning can proceed in freedom from short-run revenue considerations.

The importance of the existing planning process was underlined by OCUA with the following statement:

The Council of Ontario Universities' processes of assessment, appraisal and three-year institutional plans must remain in place, and Council will be prepared to assist in the enforcement of these processes by recommending appropriate penalties in the doubtless unlikely event that the need should arise. For the rest, Council's request that COU submit expanded monitoring reports and new programme proposals in an annual package acquires redoubled significance. In a setting where graduate funding is divorced from enrolment levels for a minimum period of two years, Council's interest not only in new programme development, but in the possible reduction of established programmes that can be considered without immediate revenue loss, will be absolute.

REFLECTIONS ON EXPERIENCE TO DATE

An account of the past several years would be incomplete without some reference to the considerable amount of deeply felt reaction to many of the ACAP reports.

This type of system-wide evaluation and planning is novel in the academic world. The wisdom of the procedure may be admitted in the abstract, but its execution does strike close to the amour propre of the professoriate. As time passes, there appears to be an increasing recognition of the very substantial achievements of the Ontario universities in devising a cooperative system of graduate work.

The process has engendered at all levels of the university system an enhanced awareness of the need for careful planning within each institution and for a much greater degree of cooperation amongst universities in terms of system planning. It has undoubtedly helped to develop broader mutual understanding throughout the system.

The procedures nevertheless have been subjected to a variety of criticisms. The extensive consultation and attention to "due process" has made the assessments seem ponderous and bureaucratic. Critics have questioned whether the effort has been worth the cost. Variation in the quality of the consultants' advice has been observed.

In spite of the criticisms and the difficulties, the programme of assessments and appraisals has general support within the university system. As stated by the University of Toronto, "the planning process has served many useful purposes to date, most notably in leading Ontario universities to undertake important self-evaluation, in increasing the universities' movement toward inter-university cooperation and toward common high standards for graduate work in Ontario, in encouraging some division of labour, and in drawing attention to particular problems in specific disciplines"⁴.

⁴ *Brief to the Ontario Council on University Affairs* (Toronto: University of Toronto, 1975).

3.

ACADEMIC SUPPORT: LIBRARIES COMPUTERS INSTRUCTIONAL METHODOLOGY APPLICATION SERVICES

A PLAN FOR LIBRARY DEVELOPMENT

The Board for Library Coordination first met in December, 1971. During 1972, it held a number of meetings to develop an overview of the university library system in Ontario and to establish priorities for collaborative development. This reassessment culminated with the presentation to the Council in May, 1973, of a major report, *A Proposal for the Establishment of a Cooperative Library System for the Ontario Universities*, which was approved as a plan for library cooperation.

The report began by setting forth the objectives of library cooperation. It recalled that in 1968 a joint meeting of COU and the Committee on University Affairs had established the guidelines for an Ontario library system, to which all provincially assisted universities had formally agreed. Included in the guidelines were the following two propositions:

That each university be prepared to commit itself to participate in an Ontario universities' library system, the principal features of which would provide for the various libraries to be essentially self-sufficient in the provision of service for undergraduate use, and to be effectively interdependent in the provision of service for research and graduate use.

That with such system development it would be anticipated that there would be appropriate coordination and centralization of technical processes, that library automation would be introduced where appropriate, and that there would be appropriate centralized storage of less frequently used library materials.

The Dimensions of Library Cooperation

The major aim of a cooperative library system was set forth as the optimal use of available library resources and the consequent elimination of undesirable duplication. Extensive duplication of collections is required in basic undergraduate fields; however, Ontario universities cannot afford to duplicate strong research collections in all disciplines. The university system must develop the

facility to assess present collections and their utilization. Observing that during the past ten years the universities had emphasized rapid growth, the Board concluded that a cooperative approach was emerging among the university libraries, and that the time had come for library assessment and long-range planning.

Two ways to reduce unnecessary duplication of library resources were identified: collection rationalization within each university, and a cooperative plan at the provincial level combining identification of strengths for collection development with the ACAP recommendations and their implications for academic libraries.

The idea that a group of libraries, each building its own collection for its own purposes, will somehow manage to assemble all of the material that is needed is not valid. Without a coordinated plan for collection development among libraries, it is highly unlikely that individual collections will complement and supplement one another.

Traditionally, the best means of gaining physical access to recorded knowledge has been for each university library to acquire as many books and other materials as its funds and space would permit. Individual university libraries have tended to build their collections with relatively little attention to the availability of resources elsewhere, because of the difficulty of assuring faculty members that books essential for research could be secured quickly from another source. This is due, in part, to insufficient information about the library holdings of other universities and to inadequate mechanisms for acquiring physical access to library resources throughout the country. Thus, there is at present an insufficient base for the cooperative development of collections. With the recent explosion of publication activity in all parts of the world, no library can hope to have the funds, the staff, the time and the space to acquire, organize and store the quantities of research material that are being made available today. Book prices and operating costs continue to rise, and buying power is shrinking. Costs of acquiring, cataloguing and storing large research collections in many subjects are becoming increasingly prohibitive.

The rapid growth of graduate programmes and research has far outstripped the growth of libraries to support them. Several surveys and studies conducted during the past ten years have concluded that the library resources of Canadian universities are inadequate, particularly in the humanities and social sciences. However, it is a recognized fact that collection policies can assist in making the best use of available resources in relation to the academic objectives of the institution. Collection policies can provide a basis for university libraries to rationalize their collection development programme, provide collection librarians with guidelines for day-to-day selection, provide a means for establishing and improving profiles for on-approval purchasing, and provide criteria for determining how well the needs of the university community are met.

Academic Support

The Advisory Committee on Academic Planning is carrying out discipline assessments to determine the number and locations for various graduate programmes and areas of concentration within the programmes. As soon as an assessment is completed for each programme area and long-range decisions are made and agreed upon, it will then be possible to begin developing a plan for the rationalization of research collections in support of particular programme areas.

An integral part of ACAP discipline assessment is a report prepared at each interested university, jointly by the department and the librarian, on the state of library support for graduate work. The present methods of reporting have been worked out by ACAP and by the Ontario Council of University Libraries. The Board for Library Coordination recommended that ACAP be requested to require, in all future discipline assessments, collection policies from each university for each discipline assessment.

To pursue activities in the area of collection policy development and collection rationalization, the Board appointed a Committee on Collection Policy with two representatives from each university, an academic representative and a librarian. The Committee's terms of reference are to coordinate the development of formal collection policies in the universities, to negotiate modifications in the university collection policies for the purpose of rationalization in terms of system need, to liaise with the Advisory Committee on Academic Planning, and to ensure a minimum of duplication in the purchases of major items. Meetings of the Committee and related groups were held through 1974, and a format for the development of collection policies by the universities has been produced. Each university is currently engaged in the development of collection policies. When these are available, along with the results of various discipline assessments, the Committee on Collection Policy will be able to review collection policies and recommend modifications.

Union Catalogues

The basis for meaningful library cooperation among universities is knowledge of the collections held in each library. For example, the user will want to know the location of a particular item or the strengths in specific subjects of the different institutions; the administrator will want to know the comparative collection trends and the concomitant cost implications; library staff will want to have access to complete bibliographic records for library collections as support for cataloguing and book processing. The mechanism which will respond to this range of queries is the union catalogue with a full bibliographic description of the holdings of the member libraries.

Union catalogues have been in existence for many years in the form of card catalogues or printed books. While serving specific functions, these catalogues

have had limited success by having, usually, only a single access point, the main entry. Developments of the last decade have proved the feasibility of machine-readable systems of bibliographic information, which can provide access points of various kinds in many locations.

The Board proposed that high priority be given to the creation of an Ontario universities' library union catalogue. This was considered essential to the improvement of university library services, the rationalization of library collections, and the building of a regional network of bibliographic information. Despite the joint statement of COU and CUA in 1968 that such a system should be established, no substantial progress toward its formation had been made until April, 1972, when six university libraries informally agreed to share their systems and resources. (By spring of 1973, eleven university libraries were participating in cooperative projects.) The first objective of this cooperative consortium was the production of computer-based union catalogues of specialized library materials such as documents and periodicals. The development of a union catalogue of the major library collections, monographs (single books), had not yet been initiated.

The functions of a union catalogue of monographs for an Ontario bibliographic system were outlined as follows:

Acquisition — The availability of bibliographic data would reduce the cost of record creation and record entry in the local acquisition system.

Cataloguing — Existence of a standard bibliographic record would eliminate the current duplication of cataloguing efforts. As demonstrated in cataloguing service operations elsewhere, the costs of both cataloguing and book processing would be reduced. Better use of the professional cataloguing expertise at each university would also be achieved.

Collection development — Local libraries could search the union file for specific items to determine availability and to make decisions about acquisition. Measures of local and comparative strength in specific areas could be made to determine collection trends and appropriate action to be taken. On a provincial basis the monitoring of collections development would be a more detailed and dynamic analysis.

Interlibrary loan — The location process necessary for interlibrary loans would be greatly accelerated as soon as a sufficiently large record of university library holdings were available in the union catalogue.

Specialized user services — Subject bibliographies from local records or the total system records would be available for users. This would greatly assist the cooperative teaching programmes being developed between universities, as well as individual research projects.

Management data — Statistical information derived from a union catalogue could lead to improved local library management systems and facilitate system-wide analyses of collection use, etc.

Academic Support

An automated union catalogue can provide improved services at reduced cost. Estimates can be made of the magnitude of potential cost savings through the full application of cooperative library automation. The area of technical services (book processing, involving the activities of order/receiving, cataloguing, catalogue card production etc.) is expensive and labour intensive. In 1974-75, the libraries of the fifteen provincially assisted universities spent some \$13 million annually in salaries alone, associated with these functions. Potential savings in an Ontario university library system would vary from institution to institution depending on local organization, but the Board estimated that there should be a minimum savings of 20% in libraries with completely manual systems, and 10% in libraries with partially automated systems.

The Board recommended that a demonstration project be mounted to illustrate the capabilities and benefits of a union catalogue system of monographs for the Ontario university library community. The proposal for a demonstration project, involving six Ontario university libraries, was elaborated in some detail. Costs of the demonstration were calculated, and estimates made of the cost savings which should be demonstrated. Developmental funding was seen as necessary on the grounds that the projected cost savings could not be realized fully during the demonstration project itself because of the time required to reorganize technical services functions in each of the participating libraries. Application was made to the Ministry of Colleges and Universities through the Committee on University Affairs for developmental funding, and in the fall of 1973, a grant of \$386,000 was approved.

Six Ontario university libraries were selected for participation in the demonstration on the basis of variations in size and age of library, to provide a representative sample. The initial group was comprised of the universities of Toronto, Western Ontario, York, McMaster, Guelph and Brock. It was recognized in the planning that the proposed system could be used by libraries other than those of Ontario universities, and that it had the capability for interfacing with other provincial or regional bibliographic systems. Compatibility with an eventual national library system was one of the planning principles. As this proposal was being developed, the Quebec university libraries expressed an interest in joining with the demonstration. Upon the recommendation of the Board, the Council approved initial participation of the libraries at McGill and Laval universities. Funding for this was provided by the Conference of Rectors and Principals of the Quebec Universities.

After review of various alternatives, a cataloguing support system available at the University of Toronto was selected as the basis for the demonstration project. The project was planned for implementation in two phases over an eighteen month period. The first phase, organization and planning, was scheduled for the six-month period July to December, 1973, with the one-year

operational phase to begin on January 1, 1974. Because of some not-unexpected organizational problems, the operational phase did not begin until the spring of 1974, and the demonstration period was extended to the end of April, 1975. A full report on the project will be available by the end of 1975. At the conclusion of the demonstration, the project was continued and plans were made for expansion of the system on a fully self-supporting basis.

In 1975-76, the following libraries are planning to join the system: two additional Ontario universities (Laurentian and Lakehead), five additional Quebec universities, three Ontario public libraries, the Canada Department of Agriculture, the Canada Ministry of External Affairs, an organization representing the community colleges of Quebec, and the Bibliothèque National du Québec.

While the development of a cataloguing support system for the monograph demonstration project consumed most of the effort of staff and university participants during 1973 and 1974, development of other cooperative union catalogues has continued apace. By the summer of 1974, a union system of government documents included nine of the Ontario university libraries and the Department of External Affairs.

A second edition of a serials union list was issued in April, 1974, containing the holdings of six Ontario university libraries and the Toronto Metro Public Library. Development is underway on automated union systems for maps and for subject heading authority systems.

Participation of Ontario university libraries in various operational cooperative projects is on a voluntary basis. The condition of participation is adherence to collective decisions on the project concerned. Thus, a university entering into a cooperative activity agrees to give up its autonomy into that area.

Depository Libraries

The Board's plan for library coordination also contained a proposal for a study of the need for depository libraries. Shared depository libraries holding little used materials have been successful in other jurisdictions. The Board believed that the establishment of depository libraries in Ontario should be explored on the grounds of possible savings in both operating and capital expenditures. A survey was proposed to determine the percentage of less frequently used materials and the cost benefits for alternatives in housing these, and to recommend on the requirements for depository libraries. Because of other priorities, this study has not been initiated.

Sharing of Books

With the above summary of recent initiatives in library cooperation, it should not be forgotten that one very concrete mechanism for sharing, interlibrary

lending, has been operative for a number of years. Over the past three years, about 90,000 loans of books and photocopies have been made by the university libraries each year. Over 70% of these loans were to other than Ontario university libraries. Under the interlibrary loans procedure, a prospective borrower applies to his home library, which acquires the book on loan from another library.

During 1974-75, an alternative procedure was developed whereby faculty and graduate students could borrow directly from libraries in Ontario universities other than their own. Establishment of this system required the negotiation amongst the universities of an agreed minimum set of sanctions which would be applied against delinquent borrowers at their home universities.

Interlibrary lending in Ontario is facilitated by the Interuniversity Transit System, operated since 1967. A fleet of station wagons plies daily amongst the 13 southern Ontario universities. In 1974-75, the system carried nearly 50,000 loan items amongst the Ontario universities, as well as nearly 10,000 to and from the Quebec university system. In 1973-74, the Transit System began to carry in addition mail amongst the universities and certain associated agencies. In the first year, estimated postal savings were about \$28,000; this grew to \$52,000 in 1974-75.

ARRANGEMENTS FOR SHARING OF COMPUTERS

For some years, the Council of Ontario Universities has been concerned with improving the quality and efficiency of computer services in Ontario universities, through its Office of Computer Coordination and Board for Computer Coordination. Underlying the activities of these groups has been the conviction that cooperative use of computing resources offers the prospects of economy and improved services to the user. The *Sixth Annual Review* reported on plans for a resource-sharing computer communications network (METANET). The proposal showed how computer facilities could be linked to broaden the range of services available to users. A pilot programme was outlined for a network linking six locations within three years. A cooperative funding arrangement was suggested, entailing the involvement of the universities, industry, and government, both provincial and federal. The Ministry of Colleges and Universities, responding to a request for funds for the development of METANET, retained an independent consultant to examine the proposal. After visiting a number of the universities, the consultant concluded that, while the proposal was technically sound, a prerequisite to sharing and the development of specialization by centres would be the establishment of a central body "with authority to plan and coordinate the future development of computing services in Ontario universities". This body would, as a primary responsibility, determine the appropriateness and effectiveness of METANET for rationalizing computer services.

The Board for Computer Coordination supported this suggestion, and recommended to the Council the establishment of a task force. The mandate of the Task Force on Computer Services, established in the fall of 1973, was to examine the requirements for administration, management, financing and operation of the proposed computing system, and to recommend appropriate machinery to meet the requirements. Membership of the Task Force reflected a range of computing interests and experience; in addition, the Task Force benefited from the assistance of two non-university advisers with broad experience in industry.

The Task Force concluded that disparity does exist in the quality of computer services provided at the different universities in Ontario, that the costs of alternative means of providing services were unknown, and that no single problem, and thus no single solution, existed. The Task Force thus rejected the concept of an overall authority to administer the delivery of computer services, and instead decided to recommend an organizational framework capable of responding to initiatives from the individual universities.

In August, 1974, the Task Force issued a preliminary report in the form of a white paper for review by the universities. The Task Force set out to create an environment for fostering the development of cooperative projects. This was seen as having three phases. The first would be the identification by universities of potentially beneficial interinstitutional projects. For this to be successful, each university would need its own planning machinery to identify needs and priorities. To provide for communication among institutional divisions, it was recommended that each university appoint a computer services coordinator who would know his university's needs and would communicate with other coordinators through a Computer Services Planning Group with representation from each of the universities. Opportunities for potentially useful cooperative projects would be identified through exchange of information within this group.

The second phase in the development of each cooperative project would be the elaboration of detailed plans by a task force appointed by the universities interested in participating. Each university involved would decide on the basis of the detailed plans whether it wished to participate or withdraw. The plans would be submitted to a province-wide Computer Services Board (successor to the Board for Computer Coordination) which would examine the project in relation to others, from the standpoint of the orderly development of the whole system. The Board would recommend whether or not to proceed with the project.

The third phase would be the implementation of the project. It would involve establishment of the management structure called for in the project proposal, and proceeding through the required steps. The Board would maintain liaison with the project through the Office of Computer Coordination in order to provide for review and assistance. In order that the Computer Services Board

could maintain an overview of the needs of the system, the Computer Services Planning Group, in addition to generating individual proposals, would advise the Board on planning needs for the system as a whole.

Most projects would involve some form of interinstitutional trading. The basis for pricing services had previously been developed in a report on computer charging.¹ The Task Force urged the universities to implement the principles of this report as quickly as might be feasible. The Task Force believed that rationalization of computing within the institutions would be promoted by a user-oriented charging system. To ensure that prices for interinstitutional trade were fair and equitable, it was proposed that the Computer Services Board establish as a subcommittee a Computer Services Review Panel.

The draft report of the Task Force elaborated on these points at some length and provided considerable background documentation which had led it to its conclusions. The draft report was reviewed by the universities and reactions were assembled.

Reaction to the white paper was overwhelmingly negative. While a few universities supported the approach to a cooperative planning process, the majority rejected the proposals as unnecessarily cumbersome and bureaucratic. Some also rejected the proposals because they saw them as threatening to the proper autonomous right of a university to make its own decisions in this area. There were also comments that the case for wide-scale sharing of computing resources had not been made, and that where sharing in specific instances would be cost-beneficial, it would occur naturally between institutions without the necessity of an elaborate structure to promote sharing.

Having received such a generally negative reaction, the Task Force went back to the drawing board. After considerable reflection on alternatives, the Task Force reluctantly came to the conclusion that it could not determine a set of recommendations that were in any way consistent with the original terms of reference, and yet acceptable to the universities. The Task Force made several attempts at modifying the structures and functions described in the draft report and then tested them against the responses. After removing those aspects which appeared to be objectionable to the universities, the Task Force found that it was basically left with facilitating mechanisms. Since there was thought to be considerable interest in facilitating mechanisms, a paper was produced describing these. The Task Force submitted this paper to the Board for Computer Coordination, and requested that it be discharged without having completed its task.

In the circumstances, the Board decided to recommend to the Council that its own terms of reference be revised to include some of the facilitating functions outlined in the paper. In the absence of a definitive programme of activities, the

¹*Report on the Task Force on Computer Charging* (Toronto: Council of Ontario Universities, 1971).

Board recommended that no staffing be provided for the Office of Computer Coordination, beyond a limited amount of secretarial service to the Board. The reaction of the Council to this outcome was considerable disappointment, and an unwillingness to conclude that this was the best that could be done in an area where members of the Council believed there was considerable opportunity for rationalization and savings through resource sharing. The Council reaffirmed its view that computer coordination was important, and that the questions should be addressed and dealt with. Members felt that there should be an acknowledgement on the part of the universities that they should not act unilaterally in the field of computers, and that the university administrations must show a commitment to look seriously at this area. The Council, therefore, decided to ask the chairman of the Task Force to provide the Council with personal advice on how it should proceed, in the light of the wishes of the Council to proceed positively. Recommendations from the Task Force chairman led to the adoption of the following recommendations by the Council on April 3, 1975:

1. That a Board for Computer Services Coordination be established with the following terms of reference:
 - (a) To provide an independent review and assessment of the progress made by Ontario universities in developing successful cooperative projects in all aspects of computer services including hardware and software;
 - (b) To recommend to COU on:
 - i) all proposals for special funding such as start-up costs or communications costs,
 - ii) broad objectives and policies for the delivery of computer services in Ontario universities,
 - iii) the terms of reference of the Office of Computer Coordination and the level of office support required to assist the Board in carrying out its functions;
 - (c) To examine the rationale of proposals for major new systems (hardware or software) costing in excess of \$100,000 (purchase or total development cost) and to offer advice to the institution(s) concerned;
 - (d) To identify and report on overall changes which may occur in the current and projected patterns of use and provision of computer services in Ontario universities;
 - (e) To identify areas where cooperative projects might usefully be explored and bring these to the attention of the appropriate bodies;
 - (f) To assist, on request, any institution or group of institutions in developing and/or implementing resource-sharing agreements;
 - (g) To assist, on request, any of COU's institutions in assessing their needs for computer services and determining the most effective and efficient ways of meeting those needs;

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- (h) To provide, on request, an independent assessment of the price structure for interinstitutional sale of computer services;
 - (i) To report annually to COU;
 - (j) To gather from the universities and coordinate and disseminate such information as required to discharge the above terms of reference as effectively and efficiently as possible.
2. That a number of Computer Services Planning Committees be established on a regional basis. The membership on these regional committees should not be restricted to universities, but could include any other institution considered appropriate. The number and membership should be flexible and adapt to changing circumstances.

Terms of reference for these committees would be determined by the participating institutions but might include the following:

- (a) To identify areas where the possibility of resource sharing should be explored;
- (b) To take appropriate action to ensure the development of a detailed proposal for resource sharing which can be reviewed and approved by each participating institution;
- (c) To report regularly to the Board for Computer Services Coordination on progress made towards successful cooperative projects in computer services;
- (d) To establish any other terms of reference which the participating institutions consider necessary;
- (e) To gather, coordinate and disseminate such information as it deems necessary to carry out its task effectively and efficiently. This information should be coordinated with that gathered by the Board.

Members of the Planning Committees are to be chosen by the participating institutions, but should include a member of the Board, selected by the Board.

3. That each university, which has not already done so, establish appropriate criteria and processes by which it can judge whether or not a resource sharing proposal will meet its computing needs more effectively and efficiently.
4. That all proposals for major new systems (hardware or software) costing in excess of \$100,000 (purchase or total development cost) in any university be reported to the Board.
5. That COU recommend to OCUA that MCU should, as a matter of policy, provide special funds subject to the endorsement of the Board, to offset the start-up costs of resource sharing projects and underwrite special communications costs. The availability of federal support in this area should not be overlooked.

At the time of this writing, the Board for Computer Services Coordination is

*Instructional Methodology:
the Ontario Universities' Programme for Instructional Development*

operating under the terms of reference outlined above, and the regional planning committees are in the process of being established.

**INSTRUCTIONAL METHODOLOGY: THE ONTARIO UNIVERSITIES'
PROGRAMME FOR INSTRUCTIONAL DEVELOPMENT**

In 1970, a study of educational technology was undertaken under the joint sponsorship of the Committee of Presidents (predecessor to COU) and the Committee on University Affairs. A joint steering committee of the sponsoring bodies commissioned Mr. Bernard Trotter, Head, Office of Academic Planning, Queen's University to undertake a study which would explore the relevance to the Ontario university system of a range of alternate approaches to educational technology. The report¹, completed in December, 1970, took as a starting point the application of television and other forms of technology, but placed its greatest emphasis on the systematic development and evaluation of the instructional process. Action taken on the report focused on the non-technological aspects of improving university teaching. Among its recommendations, the Trotter report proposed that the universities of Ontario establish a "centre for instructional development" to assist the faculties of Ontario universities in improving the effectiveness of instructional processes in terms of objectives, content and methods.

In April, 1971, the Committee of Presidents adopted several resolutions including "that CPUO endorse the principle of establishing a centre for instructional development and seek through CUA special funding to cover the first two years' operations". Following this approval in principle, the concept of a centre was elaborated and modified by the joint steering committee which had directed the study. Discussions continued throughout the 1971-72 academic year within the joint steering committee and the parent bodies.

In the early fall of 1972, the steering committee revised its proposals in order to focus on activities rather than a structure. Now proposed was a "programme for instructional development" rather than a centre. The central body would have a minimum of staff and would concentrate on acting as a review body evaluating proposals made by faculty for funding of individual professional development or course development and providing consulting services on request to departments or interuniversity groups. This programme would be seen as experimental and the degree to which it appeared to be serving the stated objectives would be assessed after two years before a decision to continue it or alter it were made. In reacting to this revised proposal, COU indicated to

¹ *Television & Technology in University Teaching* (Toronto: Committee of Presidents of Universities of Ontario, 1970).

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the committee that it wished further revisions to the proposals so that a greater emphasis would be placed on involvement of the institutions, as well as of the individual faculty member. A final outline for the programme was approved by the COU in December, 1972. The programme was described as follows:

Purpose

To assist faculties of Ontario universities in improving the effectiveness of instructional processes by systematic development of objectives, content, methods and evaluation for each course offered, with economy in the application of instructional resources.

Functions

1. To assist in arranging opportunities for instructors to develop teaching programmes using contemporary methods in course design and presentation and for faculty members interested in pursuing instructional development as an area of study.
2. To assist interuniversity discipline groups wishing to develop instructional materials or full courses on a basis consistent with the aims and purpose of the programme.
3. To provide useful opportunities for graduate students in appropriate disciplines.

The joint committee was maintained to serve as the overseeing body for the programme, and funding was provided by the government on the recommendation of the Committee on University Affairs. Dr. H.M. Good, Professor of Biology at Queen's University was appointed Director of the programme and took up these responsibilities on a full-time basis in the summer of 1973. The joint committee considered the first applications for grants at a meeting in October, 1973.

The programme for Instructional Development began its work in an atmosphere of mixed interest, skepticism and opposition. In choosing an initial strategy the committee decided that, if the grants were awarded on the basis of critically argued briefs, if the funds were to a considerable extent provided for a release time (to make it possible for teachers to study relevant background material), and if a considerable measure of institutional support in the form of roughly matching resources were provided, then the process should work towards resolving the problems in instructional development which the committee wished to address.

Simultaneously with the announcement of the programme of grants, a system of liaison officers was established. The liaison officer was expected to act as an information source for interested staff and students on his campus, and to provide a point of contact between the office of the programme and his university. It was suggested that he might appropriately represent a local committee

which had on it representatives of the administration, the faculty association and the student body.

Since the programme was established as experimental, the joint committee deliberately felt its way through the first year of operation. It did not, for instance, issue at the beginning a set of guidelines on eligibility for grants. It was thought that the strategies of the programme needed to evolve in response to the felt needs of faculty members and the universities, and in relation to experience. Neither did the committee determine from the outset a set of priorities for the activities of the programme. The committee was conscious of the need for priorities, but felt that priority-setting needed to be approached carefully, in relation to evolving needs.

In order to seek guidance, the programme sponsored in November, 1974, a workshop on "Priorities '74". Some 70 staff and students met for a three-day workshop designed to develop statements about the priorities which the programme should adopt for 1974. Delegates for the conference were chosen by student associations, faculty associations and university administrations. Two students and two staff from each participating institution were invited. Some of the ideas which came through clearly at this conference could be expressed as needs for:

- a better system of rewarding excellent teaching
- more precise enunciation of objectives at all levels (institutional, course, lesson)
- more critical evaluation of students, teachers and programmes, with evaluation carefully related to objectives
- more varied formats for presentation of programme; for example, independent study courses available intramurally, perhaps as alternatives to the traditional form; courses based on student-teacher contracts, etc.

By April, 1974, the committee felt that it had sufficient experience in reacting to proposals to issue guidelines for evaluating grant applications. The committee then was able to indicate its objectives and general approach, the criteria which would be considered in evaluating proposals, the categories of work which would not be normally eligible for support, and the conditions of awards.

In October, 1974, COU considered the future of the programme. A resolution was passed, "that, in order to allow for evaluation at the end of two years, and in order to allow grantees sufficient time and funds to complete their projects, the programme be continued for a third year at approximately the current level of funding, and that a decision be made in fall of 1975 concerning the future of the programme beyond 1975-76".

Funding for the programme in the three-year period 1973-74 to 1975-76 has been provided entirely by the Ministry of Colleges and Universities. The grants for the three years respectively were \$250,000., \$350,000. and \$350,000., and of these total sums, after setting aside funds for operating the central office, con-

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ferences, etc., the sums available for grants were \$192,000., \$260,000. and \$223,500.

Also in October of 1974, the Committee on Instructional Development agreed to a procedure for evaluating the impact the programme had had to date, the manner of its operations, and the need for continuation either in the form currently operating or some different form.

The plan for evaluation involved nomination of several persons to an evaluation team. At least one of the team would be an expert in instructional development from outside the Ontario university system. The team would be asked to address itself to the following questions:

1. The success of the projects supported in terms of achieving their stated goals.
2. The extent to which programme funds have resulted in innovation or modification of instructional processes in Ontario universities.
3. The impact of the programme on the level of commitment to instructional development in each of the universities.
4. Student reaction and student performance in relation to course modifications supported by the programme.
5. The distribution of effort by university and discipline, and the range of impact of the programme.
6. The extent to which the programme has helped to produce a cadre of expertise in instructional development in Ontario universities.
7. The extent to which the results of projects have been of value to institutions other than those in which they were conducted.
8. Whether there are areas of activity which have been neglected by the programme, and which should receive attention in future.
9. The need for the programme and the validity of its objectives on which it was instituted.
10. Appropriate future methods of promoting improvement of the instructional process in Ontario universities.

At the beginning of 1975, Dr. Harold Good expressed his wish to be relieved of responsibility as Director of the programme. For 1975-76, Dr. F.W. Parrett was appointed Director, on leave of absence from the Department of Chemistry, Royal Military College.

During the summer of 1975, the team evaluating the first two years of the programme was at work. Appointed as the "outside expert" and chairman of the team was Professor A.N. Main, Coordinating and Research Officer, Coordinating Committee for Improvement of University Teaching in the United Kingdom. The other members of the team were experienced academics from the Ontario university system who had not been directly involved with the programme: Dr. Peter Morand of the Department of Chemistry at the University of Ottawa, and Dr. Alwyn Berland, Dean of Humanities, McMaster Univer-

sity. The report of the evaluation team was submitted to COU in the autumn of 1975, and will be widely discussed in the university community before decisions are taken by COU and the government.

APPLICATION SERVICES

When our last review was written three years ago, the Ontario Universities' Application Centre was a fledgling. During 1971-72, the Centre was in a pre-operating cycle, providing a limited number of services, and gearing up for its first full year of service to applicants, universities and government. By 1974-75, the Centre had reached adulthood and was processing annually some 175,000 applications from 67,000 applicants. The Centre now has a full-time staff of 15, with part-time staff at peak periods of up to 30. The total operating budget is approximately \$500,000.

The Application Centre was established to provide a mechanism for reducing confusion and duplication of activities associated with the processing of multiple applications to the Ontario universities, in such a way as to benefit the students and high schools, as well as the universities themselves. As a by-product of this coordinating procedure, accurate statistics on the pattern of applications not heretofore available can be generated for the guidance of university admissions offices, university planning agencies and government.

The Centre was set up under a Board of Management, responsible to COU. Its initial composition was five members from the Ontario Universities' Council on Admissions; one member each from the Ontario Secondary School Headmasters' Council, the Ministry of Education, and the Ministry of Colleges and Universities; and the Executive Director of COU.

The creation of the Centre was not without controversy, since some within the universities saw it as an unnecessarily cumbersome means of achieving the desired ends. In order to deal with these concerns, the Council established a committee in the spring of 1973 to review the functioning of and the need for an application centre. This committee reported in November, 1973, approving of the operations of the Centre and recommending the continuation of, and, in fact, the expansion of the Centre's operations.

The most convincing evidence of the Centre's acceptance within the university system has been the various requests for expansion of its activities. The Centre was initially established to process applications to first-year degree programmes. Subsequently, at request of users within the universities, the operations of the Centre have been extended to cover first-year diploma programmes, preliminary year and grade 12 entry programmes, upper-year transfers between universities and, most notably, applications to Ontario medical schools.

The development of a medical application service was a major accomplishment, arising out of several years of study by the Council of Ontario Faculties of

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Medicine, an affiliate of COU. After approval of the creation of the Medical Application Service by COFM and COU, a start-up grant of \$50,000 was provided by the Ministry of Colleges and Universities to cover the expenses of the planning and organizational period. In January, 1974, the Director of the Centre submitted a first draft of the proposed systems and procedures for the Medical Application Service, and within six months the Service was in operation for the 1974-75 application cycle. With the expanded responsibilities of the Board of Management, COU added two representatives of the Council of Ontario Faculties of Medicine to the Board.

Perhaps the most contentious issue which arose during the first several years of the Centre's operation was the source of its funding. The initial organization of the Centre was supported by a grant of \$150,000 from the Ministry of Colleges and Universities, but the Ministry declined an invitation to participate on a continuing basis in the financing. In the first operational year, one-fifth of the cost was borne by the universities through their contributions to the COU budget and four-fifths was raised through applicants' fees. During 1972, a special COU committee on the financing of the Centre studied the issue, but was not able to arrive at a workable formula. In the absence of any viable alternative, the Council decided that the Centre should become self-supporting through applicant fees. In the first year of operation (the year in which COU bore one-fifth of the cost) the applicant fee was \$4.00; in the two succeeding years it was \$6.00, and it has been struck at \$7.00 for 1975-76.

The services provided by the Centre for the Medical Application Service are much more extensive than for the Undergraduate Application Service. For instance, the Centre duplicates voluminous academic documentation (such as transcripts and references) for the medical schools, provides a service for conversion of various university undergraduate marking schemes to a standard scale, and generates selection lists in various forms for the use of the schools. The applicant fee for this service is \$10.00 per school applied to; this fee replaced a similar fee previously required by the majority of the medical schools.

The early history of the Centre is recounted in more detail in a publication entitled *Ontario Universities' Application Centre: The First Three Years, 1971-1974*.¹ The first in a series of annual reports on undergraduate applications, *Application Statistics, 1973*² was issued in April, 1974. It is anticipated that a similar series of statistics will be issued for medical applications.

The Centre is now in a stage of maturity and is an accepted part of the high school and university scene in Ontario. In his conclusion to the report on the first three years, the Chairman of the Board of Management summarized the reasons for the success of the Centre:

¹ Toronto: Council of Ontario Universities, 1974.

² Toronto: Council of Ontario Universities, 1974.

The strength of the Ontario Universities' Application Centre and of its Board of Management to date has resided in three things: attention to a sound network of communications both at the decision-making and the operational levels with all bodies involved in or vitally concerned with the admissions process; the goodwill and unstinting support of these bodies — universities, secondary schools, the Ontario Universities' Council on Admissions, the Council of Ontario Faculties of Medicine and the Ministries; and finally, but perhaps most importantly, an earnest interest in the welfare of the main subject of these exercises: the applicant.

POSTSCRIPT

In the preceding chapters we have attempted to give an overview of the major issues which have concerned the Council over the past three years, and the activities which have resulted from these concerns. The Council, of course, also engages itself with a wide variety of other matters, not covered under the major areas already described, in order to fulfil its constitutional mandate "to promote cooperation among the provincially assisted universities of Ontario, and between them and the government of the province, and, generally, to work for the improvement of higher education for the people of Ontario".

One illustration of the wide range of activities is given by the panoply of committees, boards, and affiliates which are responsible for on-going activities. Details are given in the organizational chart (*Appendix D*) and the descriptions of associated bodies in *Appendix C*.

Another illustration of the range of issues is the number of special committees which are set up by the Council from time to time to deal with topical concerns. Over the last three years, the following special committees were established:

- Purchase of Term Papers
- Review the Ontario Universities Application Centre
- Undergraduate Scholarship Policy
- Funding of Non-Credit Continuing Education
- Relations with the Ontario Educational Communications Authority
- Assess University Policies and Plans
- Financial Implications of Graduate Planning
- Federal-Provincial Arrangements for the Financing of Universities

In the modern age, the volume of paper produced by an organization provides some measure of the amount, if not the quality of its output. The printed output of the Council's secretariat is truly formidable. The significant portion of this is in the form of published reports. A list of those currently in print is given as *Appendix F*. For an ongoing picture of activities, readers who do not already receive the *Current Review* are invited to request inclusion on the mailing list.

Other basic information about the Council is given in *Appendix A* (members, executive committee, secretariat), *Appendix B* (constitution) and *Appendix E* (financial statements).

The largest division of the Council's secretariat is the Research Division, with a staffing of 10. Research Division activities fall into three main categories:

1. Research assistance for various committees (major examples include committees on Operating Grants and Capital Financing).
2. Topical research reports produced on matters of special interest from time to time (recent examples include such subjects as the status of women in the Ontario Universities, post-doctoral education and interprovincial comparisons of government support for universities).
3. Statistical series produced annually or at other intervals (operating budget and expenditure information, applications statistics, scholarship statistics, graduate student income and support data).

A complete listing of projects engaged in by the Research Division over the past three years with a brief description of each, is given as *Appendix I*.

APPENDIX A

MEMBERS OF THE COUNCIL OF ONTARIO UNIVERSITIES AND SECRETARIAT at December 1, 1975

MEMBERS

Brock University	— A.J. Earp, President E.R. Muller, Department of Mathematics
Carleton University	— M.K. Oliver, President D.K. Dale, Department of Mathematics*
University of Guelph	— D.F. Forster, President R.G. Thomson, Department of Pathology
Lakehead University	— A.D. Booth, President J.S. Mothersill, Faculty of Science
Laurentian University	— E.J. Monahan, President* J.L. Black, Department of History
McMaster University	— A.N. Bourns, President* P.L. Newbigging, Department of Psychology
Université d'Ottawa	— R. Guindon, Recteur*, <i>Vice-Chairman</i> C. Lemyre, Department of Electrical Engineering
Queen's University	— R.L. Watts, Principal* R.D. Fraser, Department of Economics
University of Toronto	— J.R. Evans, President*, <i>Chairman</i> W.B. Dunphy, St. Michael's College
Trent University	— T.E.W. Nind, President J.W. Burbidge, Department of Philosophy
University of Waterloo	— B.C. Matthews, President D. Irish, Department of Chemistry
University of Western Ontario	— D.C. Williams, President R.G. Kidd, Faculty of Graduate Studies*
Wilfrid Laurier University	— F.C. Peters, President J. Weir, Department of Economics
University of Windsor	— J.F. Leddy, President C. MacInnis, Department of Civil Engineering
York University	— H.I. Macdonald, President C.E. Rathé, Department of French Literature

ASSOCIATE MEMBERS

- | | |
|---|---|
| Ontario Institute for
Studies in Education | — C.C. Pitt, Director
C. Beck, Coordinator of Graduate Studies |
| Royal Military College
of Canada | — W.W. Turner, Commandant
J.R. Dacey, Principal |
| Ryerson Polytechnical
Institute | — W.G. Pitman, President
J.L. Packham, Vice-President (Academic) |

SECRETARIAT

J.B. Macdonald, Executive Director*
G.G. Clarke, Secretary and Research Associate
K.M. Biernat, Assistant Secretary

Research Division

B.L. Hansen, Director of Research
A.J. Giannelli, Research Associate
C.F.W. Isaacs, Research Associate
L.C. Payton, Research Associate

Office of Computer Coordination

K. Okashimo, Consultant

Office of Library Coordination

R.E. Stierwalt, Director
K. Frost, Assistant Director
L. Farmer, Technical Assistant

Ontario Council on Graduate Studies

H.H. Yates, Executive Vice-Chairman
S.C. Cale, Research Officer

J. Flinn, Chairman, Appraisals Committee

Ontario Universities' Application Centre

H.W. Pettipiere, Director
G.S. Arthurs, Assistant Director

* Member of the Executive Committee

APPENDIX B

CONSTITUTION

Council of Ontario Universities Conseil des Universités de l'Ontario

(This body was formed on December 3, 1962, with the original name of the "Committee of Presidents of Provincially Assisted Universities and Colleges of Ontario." A formal constitution was first adopted on December 9, 1966, under the name "Committee of Presidents of Universities of Ontario/Comité des Présidents d'Université de l'Ontario." The constitution was amended on January 18, 1968; April 26, 1968; March 13, 1970; and April 16, 1971. On the latter date, the name of the body was changed to its present one, effective May 1, 1971.)

1. *Name*

- (1) The name of this body shall be: "Council of Ontario Universities/Conseil des Universités de l'Ontario."

2. *Objects*

- (1) The objects of the Council are to promote cooperation among the provincially assisted universities of Ontario, and between them and the Government of the Province, and, generally, to work for the improvement of higher education for the people of Ontario.

3. *Membership*

- (1) Those eligible for membership are (a) the executive heads of provincially assisted universities in Ontario which grant university degrees (a power conferred by a legislative or parliamentary act or charter in which such authority is specifically stated) but excluding institutions whose power to grant degrees is limited to a single professional field; and (b) one colleague, elected to membership by the senior academic body of each such institution.
- (2) Colleagues elected to membership by the senior academic body of those institutions defined in article 3, section (1), part (a), shall hold office for a term of one year, renewable.
- (3) At the time of the coming into force of this amendment on May 1, 1971, members shall be the executive heads and elected colleagues of the universities as defined in article 3, section (1), part (a) and listed in Annex A attached.
- (4) Members from other institutions which become eligible to provide members may be admitted if recommended by the Executive Committee and approved by a two-thirds majority of the members present and voting at a meeting of the Council.

4. *Officers*

- (1) The Council shall have a Chairman, elected from and by its members for a term of two years. He shall serve without remuneration.
- (2) The Council shall have a Vice-Chairman, elected from and by its members for a term of two years. He shall act for the Chairman in the absence of the latter. He, too, shall serve without remuneration.
- (3) The Council shall have as its senior paid officer an Executive Director, appointed by the Executive Committee with the concurrence of not less than two-

thirds of the members of the Council. Included in his functions shall be those of secretary and treasurer of the Council.

- (4) The Council may have other paid officers, and sub-staff, as deemed necessary by the Executive.

5. *Committees*

- (1) There shall be a committee called "the Executive" composed of eight members: the Chairman of the Council (who shall preside), the Vice-Chairman, the Executive Director (who shall have no vote), the immediate past Chairman (ex officio), and four others. The membership of eight shall include at least one from the University of Toronto, one from among the emergent universities* and four from the intermediate-sized universities. Its function is to guide the Council and, on occasion, to act for it between meetings of the Council.
- (2) There shall be a "Committee on Nominations," named by the Chairman with the approval of the Executive. It shall propose candidates for the elective offices and for membership of the Executive. It may also, from time to time, nominate members of other committees, and shall review committee membership and terms of reference as provided for by subsection (5) below.
- (3) There may be such other committees (standing and special) as are deemed necessary.
- (4) Members of standing committees shall serve for terms of not more than two years. They may be reappointed. Members of a special committee normally will serve for the duration of the committee.
- (5) At least once every two years, normally after the election of officers and the naming of a new Executive, the Committee on Nominations shall review the terms of reference and membership of committees of the Council and suggest to the Executive such changes as may seem desirable.

6. *Affiliates*

- (1) Other organizations or associations of personnel serving in the universities of Ontario may be affiliated to the Council.
- (2) Such bodies may be established by the Council or may come into being on the initiative of others.
- (3) Normally an affiliate would have some executive power delegated to it, explicitly or implicitly, by the Council.
- (4) Affiliates shall be responsible to the Council with respect to those of their interests and functions which fall within the scope of the activities of the Council.

7. *Meetings*

- (1) The Council shall meet at least twice a year.
- (2) Meetings of the Council and of the Executive may be called by the Chairman, the Vice-Chairman, the Executive Director, or any three other members of the Council.
- (3) A member who is the executive head of an institution and is unable to attend a meeting of the Council may be represented at the meeting by an alternate of his choosing. A member who is an elected colleague who is unable to attend a meeting of the Council may be represented by an alternate selected by the senior academic body of the institution he represents. Alternates shall have the power to vote at the meeting.
- (4) Committees will meet as required.
- (5) A majority of the members of the Council or of a committee shall constitute a quorum for a meeting of the Council or committee concerned.

Constitution

8. Finance

- (1) The fiscal year of the Council shall end June 30.
- (2) The chief source of financial support of the Council shall be subscriptions paid by the universities whose executive heads are members of the Council.
- (3) The scale of membership subscriptions shall be set by action of the Council.
- (4) The Council may receive additional financial support from other sources.
- (5) The accounts of the Council shall be audited by a firm of auditors appointed by authority of the Council for terms of one year, renewable.

9. Amendment

- (1) This constitution may be amended by a two-thirds majority of members of the Council present and voting at a meeting in the notice of which the proposed amendment is specified and at which at least two-thirds of the members are present.

10. Dissolution

- (1) The Council may be dissolved by a two-thirds majority of members of the Council present and voting at a meeting in the notice of which the motion for dissolution is specified and at which at least two-thirds of the members are present.
- (2) In the event of dissolution of the Council, all assets and property of the Council shall, after payment of its just debts and obligations, be distributed to one or more charitable organizations in Canada, as may be determined by the Council.

ANNEX A

Provincially assisted universities of Ontario whose executive heads and colleagues were members of the Council of Ontario Universities at May 1, 1971:

Brock University*
Carleton University
University of Guelph
Lakehead University*
Laurentian University of Sudbury*
McMaster University
Université d'Ottawa
Queen's University at Kingston
University of Toronto
Trent University*
University of Waterloo
University of Western Ontario
University of Windsor
York University

On November 1, 1973, Wilfrid Laurier University became a member of the Council.

*Universities defined as emergent at May 1, 1971.

APPENDIX C

COMMITTEES, BOARDS AND AFFILIATES OF THE COUNCIL OF ONTARIO UNIVERSITIES at December 1, 1975

COMMITTEES

Standing Committees

1. *Executive Committee*

Task: (a) To guide the Council of Ontario Universities and, on occasion, to act for it between meetings of the Council; (b) to appoint the Executive Director, with the concurrence of at least two-thirds of the members of the Council; (c) to determine the necessity of other paid officers and sub-staff; (d) to approve the membership of the Committee on Nominations (which is named by the Chairman); (e) to make any necessary changes in the terms of reference and membership of other committees; (f) to set up special committees as required.

Membership: Eight members: The Chairman of the Council (who shall preside), the Vice-Chairman; the Executive Director (who shall have no vote), the immediate past Chairman (ex officio), and four others. The membership of eight shall include at least one from the University of Toronto, one from among the emergent universities, and four from the intermediate-sized universities.

Chairman: Dr. J.R. Evans, President, University of Toronto.

2. *Committee on Nominations*

Task: To propose candidates for elective offices and for membership of committees.

Membership: Members shall be named by the Chairman of COU.

Chairman: Very Rev. Dr. R. Guindon, Rector, University of Ottawa.

3. *Committee on Operating Grants*

Task: (a) To study matters pertaining to the provincial government operating grants system and to make recommendations on these matters to the Council of Ontario Universities; (b) to maintain liaison with the relevant subcommittee of the Ontario Council on University Affairs; (c) to undertake such other related tasks as may be assigned to it by the Council.

Membership: Eight members including at least one from a large university, one from a university of intermediate size and one from a small university.

Chairman: Dr. C.M. Carmichael, Department of Geophysics, University of Western Ontario.

4. *Committee on Instructional Development*

Task: (a) To consider and make recommendations on ways of improving the instructional process in Ontario universities; (b) to adjudicate applications for grants to improve the instructional process in Ontario universities; (c) to set policy for the Programme for Instructional Development.

Membership: Members chosen by COU.

Chairman: Dr. J. Foley, Department of Psychology, University of Toronto.

Committees, Boards and Affiliates

5. Committee on Capital Financing

Task: (a) To study the problems presented by the planning, construction and financing of university buildings, and to make recommendations on these matters to the Council of Ontario Universities; (b) to maintain liaison with the organization of campus planners and physical plant administrators of Ontario universities; (c) to maintain liaison with appropriate officials of the Ontario Ministry of Colleges and Universities; (d) to undertake such other related tasks as may be assigned to it by the Council of Ontario Universities.

Membership: About half-a-dozen persons representing large and small universities, and the administrative functions of campus planning and capital financing.

Chairman: Dr. G.R. Love, Vice-President (Academic), Carleton University.

6. Committee on Student Aid

Task: (a) To study the problems relating to the provision and administration of financial aid to university students in Ontario, and to make recommendations on these matters to the Council of Ontario Universities; (b) to maintain liaison with appropriate officials of the Ontario Ministry of Colleges and Universities; (c) to undertake such other related tasks as may be assigned to it by the Council.

Membership: About seven or eight persons — some experienced in the formulation of policy for, and some in the administration of, university student aid programmes.

Chairman: Vacant.

7. Pension Board for COU Employees

Task: (a) Advise the employer on the proportion of administration expenses to be borne by the employer; (b) consider applications from members of the Plan to have their pensions payable in some manner other than the prescribed; (c) purchase annuities for retiring members; (d) determine whether a member has become totally and permanently disabled, and to select the type of benefit to be paid to such persons; (e) advise the employer on transfer of a member's credits to another registered fund or plan; (f) notify the trustee of the proportion of employer and employee contributions to be invested in equity funds and the proportion in fixed-income funds, as elected by the member; (g) provide a written explanation to each member of the terms and conditions of the Plan and of his rights and duties thereunder; (h) appoint an actuary; (i) decide on the distribution of the assets of the fund in the event of discontinuance of the Plan; (j) to review the Plan once a year and to advise COU whether any improvements are desirable and feasible.

Membership: Three persons

Chairman: P. Lewis, Comptroller, Trent University.

8. Committee on Communications with Undergraduate Applicants

Task: (a) To maintain an overview of the practices of the Ontario universities, individually and collectively, in advertising and in communicating with prospective applicants; (b) to advise universities in advance, on request concerning the acceptability of proposed programmes for advertising or for communication with prospective applicants; (c) to evaluate without undue delay complaints submitted by universities, schools, or individuals; (d) to recommend to individual universities modifications in their advertising or communications practices; (e) to report to COU those cases where recommendations to an individual university have not been observed.

Committees

Membership: The Committee will be composed of six persons: three university representatives, one nominated by Ontario Universities' Council on Admissions, one by the Ontario University Registrars' Association standing committee on liaison, and one by the Ontario Council for University Continuing Education; one person nominated by COU; one representative of the schools nominated by the Ontario Secondary School Headmasters' Council; a chairman approved by COU.
Chairman: W.K. Lye, Director of Physical Plant, University of Toronto.

9. **Advisory Committee on Academic Planning** (a Committee of the Ontario Council on Graduate Studies)

Task: (a) To assist the discipline groups in promoting the rationalization of graduate studies within the universities; (b) to advise OCGS on steps to be taken to implement effective provincial planning of graduate development; (c) to recommend, through OCGS, to COU the carrying out of planning assessments of disciplines or discipline groups and to recommend suitable arrangements and procedures for each assessment; (d) to supervise the conduct of each planning assessment approved by COU; (e) to respond to requests by COU to have a discipline assessment conducted by proposing suitable arrangements; (f) to submit to COU the reports of the assessments together with any recommendations with the Committee wishes to make.

Membership: (a) The Committee shall consist of at least seven members of the professoriate in the Ontario universities, some of whom shall be members of OCGS; (b) the members of the Committees shall serve for such periods of time as OCGS may determine, and they shall be selected in such manner as may provide for reasonable balance of academic disciplines and of universities; (c) the members of the Committee shall be appointed as individuals.

Chairman: Dr. H.B. Stewart, Dean, Faculty of Graduate Studies, University of Western Ontario (from January 1, 1976).

10. **Committee on Academic Staff Information**

Task: (a) To examine further the purposes to be served by each data element proposed for inclusion in the Statistics Canada Master Academic Staff File; (b) to suggest, i.e., is considered necessary a subset of data elements which would be maintained in a central file for system studies; (c) to propose rules and methods for assuring accessibility to the files for legitimate research and for confidentiality of sensitive information; (d) to examine mechanisms for implementing and maintaining accessible files which contain certain elements of protected information; (e) to serve as an official consultative agency to COU, MCU and OCUA on request in matters relating to academic staff information; (f) to serve as a consultative body through which individual universities might seek advice about requests for information on academic staff information.

Membership: Eight members appointed by COU.

Chairman: Prof. M. Creal, Division of Humanities, York University.

Standing Joint Committees

1. **COU/OCUFA Joint Committee on Academic Career Development**

Tasks: (a) To study the present age/salary profiles, rank distributions and other characteristics of patterns of full-time and part-time academic staff at Ontario universities; (b) to analyze the *COU Report on Academic Staff Hiring and Renewal Practices at Ontario Universities* for possible impact of these practices if continued,

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on future staffing patterns of Ontario universities; (c) to study the plans of universities for faculty career development and plans, if any, for modifying staffing patterns through altered practices in appointment, renewal or non-renewal of appointments, early retirement, termination; or reassignment of faculty (including updating and extension of the above *COU Report on Academic Staff Hiring and Renewal Practices*); (d) from these studies and analyses, and in consideration of possible provincial enrolment levels and distribution patterns, examine realistic alternative scenarios of staffing patterns and their implications for Ontario universities for the next three decades.

Membership: Chosen by the two parent bodies.

Chairman: P. Smith, Vice-President (Academic), University of Guelph.

2. COU/Ministry of Education Liaison Committee

Task: To review changes in policy, curriculum, and admission involving the high schools or universities and to keep the Ministry of Education and the universities advised of changes.

Membership: Three officers of the Ministry of Education and three representatives of COU.

Chairman: Dr. E. Stabler, College of Education, University of Western Ontario.

3. COU/Committee of Presidents of Colleges of Applied Arts and Technology Joint Subcommittee on Cooperation Between Universities and Colleges of Applied Arts and Technology

Task: (a) To determine major areas of joint concern and an appropriate order of priority among these, and to recommend the kinds of machinery required for joint effort; (b) to consider those areas of mutual concern identified at the May 16, 1969 joint meeting of COU and the Committee of Presidents of CAATs, particularly the following:

- admission policies and procedures and the implications of changes in the secondary school system;
- accreditation and recognition of professionals and para-professionals by the various professional organizations;
- resource-sharing, e.g., in such areas as libraries and computers, and the allocation of programmes between the CAATs and universities;
- cooperation of COU and the Committee of Presidents of CAATs in the preparation of inputs to the Commission to Study Post-Secondary Education in Ontario.

Membership: Eight members, four members appointed by each parent organization, and one representative from each group to serve as co-chairman.

Chairman: Dr. T.E.W. Nind, President, Trent University.

Special Committees

1. Special Committee on Funding of Non-Credit Continuing Education

Task: To propose guidelines for the participation of universities in non-credit courses.

Membership: Eight members, two drawn from the Ontario Council for University Continuing Education, two from the Council of Deans of Arts and Science, two from professional faculties engaged in continuing education, one from the Ontario Faculties of Education with a Chairman drawn from COU.

Chairman: Dr. S.F.H. Threlkeld, McMaster University.

2. *Special Committee to Assess University Policies and Plans*

Task: To assess the goals, policies and plans of the Ontario university system for the remainder of the 1970's and the 1980's in the light of the competing governmental priorities, possible financial prospects and the anticipated numbers of qualified students.

Membership: Nine members appointed by COU.

Chairman: Very Rev. Dr. R. Guindon, Rector, University of Ottawa.

3. *Special Committee to Develop a Brief on Federal-Provincial Arrangements for the Financing of Universities*

Task: (a) To review...[relevant]...documents as they relate to federal-provincial arrangements for the financing of universities; (b) to consult with such persons in the federal government, the provincial government, the universities and the community as the Committee deems may contribute to an understanding of the issues; (c) to identify the objectives for governments and universities which should be served in cost sharing arrangements; (d) to develop proposals for allocating the responsibility for financing university costs according to the stated objectives; (e) to prepare for presentation to COU at its meeting on December 5, 1975, a report in the form of a draft brief for submission to the federal government and the government of Ontario; (f) to prepare a short statement for presentation to the meeting of Executive heads of AUCC on October 28, 1975, indicating the probable thrust of the draft brief.

Membership: Six members appointed by COU.

Chairman: Dr. R.L. Watts, Principal, Queen's University.

4. *Special Committee on the Financial Implications of Graduate Planning*

Task: (a) To examine the financial and academic consequences of introducing new graduate programmes as contrasted with expanding existing programmes; (b) to examine the financial and academic consequences of discontinuing some graduate programmes; (c) to compare the overall size of the graduate enterprise in Ontario with that in other appropriate jurisdictions; (d) to seek and obtain as required the assistance and advice of OCGS and ACAP and the graduate deans; (e) to provide a progress report giving the results of these investigations by the end of December, 1975, and proposing a course of further action.

Membership: Seven members appointed by COU.

Chairman: Dr. T. Brzustowski, Vice-President (Academic), University of Waterloo.

5. *Special Committee on Relations with OECA*

Task: To review and report on COU relations with OECA.

Membership: Four members appointed by COU.

Chairman: Dr. T.E.W. Nind, President, Trent University.

Special Joint Committees

1. *Special Joint Steering Committee on Experimental Achievement Testing*

Task: (a) To direct the analysis of results of the programmes of experimental achievement testing in Ontario universities undertaken in September, 1975; (b) to designate researchers to be given access to the data, including relevant high school and university records of students to whom the tests were administered (with appropriate safeguards of individual identity); (c) to determine the form and timing of

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publication of overall test results and analyses, subject to protecting the anonymity of students and schools, as part of the overall study on the preparation of students for, and admission to, post-secondary education; (d) to undertake the above tasks in the context of the agreed purposes of COU, the Ministry of Colleges and Universities, and the Ministry of Education, which are: (1) to use the tests in 1975 on a trial basis and for research purposes; and (2) to assess the appropriateness and usefulness of these tests as instruments which might be used further in the research programme of the Joint Ministry of Education/Ministry of Colleges and Universities review.

Membership: Four members appointed by COU, two members by the Ministry of Colleges and Universities, and two members by the Ministry of Education.

Chairman: Mr. G.G. Clarke, Secretary, Council of Ontario Universities.

BOARDS FOR COOPERATIVE PROJECTS

1. *Board for Computer Services Coordination*

Task: (a) To provide an independent review and assessment of the progress made by Ontario universities in developing successful cooperative projects in all aspects of computer services including hardware and software; (b) to recommend to the COU on: i) all proposals for special funding such as start-up costs or communication costs; ii) broad objectives and policies for the delivery of computer services in Ontario Universities; iii) the terms of reference of the Office of Computer Services Coordination and the level of office support required to assist the Board in carrying out its functions; (c) to examine the rationale of proposals for major new systems (hardware or software) costing in excess of \$100,000 (purchase or total development cost) and to offer advice to the institution(s) concerned; (d) to identify and report on overall changes which may occur in the current and projected patterns of use and provision of computer services in Ontario universities; (e) to identify areas where cooperative projects might usefully be explored and bring these to the attention of the appropriate bodies; (f) to assist, on request, any institution or group of institutions in developing and/or implementing resource sharing agreements; (g) to assist, on request, any of COU's institutions in assessing their needs for computer services and determining the most effective and efficient ways of meeting those needs; (h) to provide, on request, an independent assessment of the price structure for inter-institutional sale of computer services; (i) to report annually to COU; (j) to gather from the universities and coordinate and disseminate such information as required to discharge the above terms of reference as effectively and efficiently as possible.

Membership: Chairman of Association of Computer Services Directors; a representative of computing science; a representative from the social sciences; a vice-president; a representative from the natural sciences; a member of COU; Executive Director of COU (observer).

Chairman: Dr. G.D. Anderson, Chairman, Department of Clinical Epidemiology and Biostatistics, McMaster University.

2. *Board for Library Coordination*

Task: (a) To recommend policy concerning the work of the Office of Library Coordination to the Council of Ontario Universities; (b) to recommend to COU budgets for the carrying out of the work of the Office of Library Coordination; (c) to review and evaluate the progress of the work of the Director of the Office of Library Coordination; (d) to consult regularly with the Ontario Council of University

Libraries (and from time to time with such other bodies as may appear to the Board to be helpful) on coordination and cooperation in the development of university library services.

Membership: Two (or three) chief librarians — members of OCUL, two (or three) deans of graduate studies from OCGS, four members of the professoriate of Ontario universities, due regard being paid to the composition of the Board in terms of the academic disciplines of its members and the sizes of the universities from which they come; Executive Director of COU (ex officio).

Chairman: Dr. A. Lee, Vice-President (Academic), McMaster University.

3. *Board of Management for Ontario Universities' Application Centre*

Task: (a) To recommend policy concerning the work of the Ontario Universities' Application Centre; (b) to recommend to COU budgets for the carrying out of the work of the Centre; (c) to review and evaluate the progress of the work of the Director of the Centre; (d) to consider and advise on proposals from the Director of the Centre; (e) to consult regularly with OUCA and the Council of Ontario Faculties of Medicine (and from time to time with such other bodies as may appear to the Board to be helpful) on the policy and operations of the Centre and its Medical School Division.

Membership: Eleven members appointed by COU, plus the Executive Director COU (ex officio). Five shall be chosen from the nominees of the Ontario Universities' Council on Admissions and two from nominees of the Council of Ontario Faculties of Medicine. The Ministry of Colleges and Universities, the Ministry of Education, and the Ontario Secondary School Headmasters' Council shall be invited to nominate one member each.

Chairman: Mr. B.A. Lumsden, Associate Registrar, University of Waterloo.

AFFILIATES

1. *Ontario Universities' Council on Admissions*

Task: To deal with all admissions questions (both policy and procedures) of joint concern to the Ontario universities and specifically to make recommendations with respect to the Ontario Universities' Application Centre.

Membership: At least one member from each university and not more than three from multi-faculty institutions, selection of the members to be the responsibility of the individual university.

Chairman: Dr. M.B. Ives, Department of Metallurgy and Materials Science, McMaster University.

2. *Ontario Council on Graduate Studies*

Task: (a) To promote the advancement of graduate education and associated research in the provincially assisted universities in Ontario; (b) to advise COU on the planning and development of an orderly pattern of graduate education and associated research, having regard, among other things, to the need to avoid unnecessary duplication of programmes and facilities and the need to maintain appropriate contacts with other COU affiliates; (c) to recommend annually to COU its proposed programme for the ensuing year and to submit for approval a budget appropriate thereto; (d) to report in writing to COU at least once a year on its activities of the past year; (e) to consider matters referred to it by COU and to report thereon to COU.

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Membership: The provincially assisted universities of Ontario, each represented by the Dean of Graduate Studies or the Chairman of the Committee on Graduate Studies, shall be eligible for membership in the Council.

Chairman: Dean L.A.K. Watt, School of Graduate Studies, University of Waterloo (from January 1, 1976).

3. Ontario Council of University Libraries

Task: (a) To provide a medium of communication among the directors of library facilities in Ontario universities; (b) to advise the Board for Library Coordination on matters concerning coordination and cooperation in the development and use of university library services; (c) to assist the Office of Library Coordination in the implementation of approved policies and programmes; (d) to be responsible to COU and to respond to requests from COU for advice or assistance; (e) to cooperate and maintain liaison with other agencies and councils as appropriate; (f) to develop and oversee standards of general library service in the universities.

Membership: The chief librarian of each provincially assisted university which is a member of the Council of Ontario Universities and the Director of the Office of Library Coordination (ex officio) without vote.

Chairman: Mr. M. Shepherd, University Librarian, University of Waterloo.

4. Council of Ontario Faculties of Medicine

Task: (a) To provide an effective means of coordination of effort and a regular medium of communication between the faculties of medicine of universities of Ontario, having regard to the need to avoid unnecessary duplication or overlap or programmes between individual faculties and to provide special interuniversity projects which relate to medical education, research and health services; (b) to advise COU on matters which will influence medical education and research and to consider such matters as are referred to it by COU; (c) to serve as liaison between the faculties of medicine and government agencies concerned with health and hospital services, professional colleges and associations, and any other organizations the activities of which influence medical education and research.

Membership: Each Ontario university with a faculty of medicine represented by the Dean of Medicine, with power to add the vice-presidents of health science and other associated members as occasion requires.

Chairman: Dean R.B. Holmes, Faculty of Medicine, University of Toronto.

5. Committee of Ontario Deans of Engineering

Task: (a) To provide a medium of communication among the engineering faculties of Ontario so that engineering education in the Province may evolve optimally; (b) to advise the Council of Ontario Universities on any appropriate aspect of education.

Membership: Deans of Engineering of faculties conferring the baccalaureate degree at institutions of post-secondary education in Ontario whose presidents are members of COU.

Chairman: Dean B. Etkin, Faculty of Applied Science and Engineering, University of Toronto.

6. Ontario Council for University Continuing Education

Task: (a) To promote closer relations among individuals and institutions interested in university continuing education; (b) to provide for the interchange of information

and ideas among university continuing education faculty and staff; (c) to focus public attention upon and encourage acceptance and understanding of the importance of university continuing education for adults; (d) to encourage and stimulate professional improvement and excellence among its members; and (e) to cooperate with the national organization (Canadian Association of Departments of Extension and Summer Schools) in whatever endeavours it is mutually agreed fulfil respective objectives of association.

Membership: Membership shall be open to university personnel associated with departments of continuing education, or extension, or adult education, or summer school, or part-time studies of degree-granting universities whose presidents are members of the Council of Ontario Universities.

Chairman: Mr. J.G. Murray, Office of Continuing Education, Carleton University.

7. *Ontario University Registrars' Association*

Task: (a) To provide an effective means to coordinate effort and a medium of communication among members of the Association; (b) to concern itself with items of academic administration, including admissions, registration, examinations, scheduling, transcripts, records, calendars, scholarships and awards, and secondary school liaison; (c) to encourage and conduct studies of matters related to (b); (d) to conduct seminars for the exchange of information and development of new procedures.

Membership: Administrative officers of Ontario universities responsible for the areas of (b) above.

President: Mr. A.O.C. Cole, Office of Registrar, Trent University.

8. *Ontario Council of Library Schools*

Task: (a) To provide a medium of communication among the library schools of Ontario; (b) to promote the development and foster the improvement of education for librarianship in Ontario; (c) to advise the Council of Ontario Universities on any appropriate aspect of library education.

Membership: The Dean and one senior faculty member from each library school of a university whose president is a member of the Council of Ontario Universities.

Chairman: Dean W.J. Cameron, School of Library and Information Science, University of Western Ontario.

9. *Committee of Deans of Ontario Faculties of Law*

Task: (a) To provide an effective means of communication and cooperation among the faculties of law of the Ontario universities on matters of common concern; (b) to advise the Council of Ontario Universities on matters of common concern in legal education and research, and to consider matters referred to it by COU; (c) to provide an effective means of cooperation among the faculties of law of Ontario universities for liaison with and advice to the Law Society of Upper Canada on matters of common concern in legal education and research.

Membership: The dean (or acting dean) of each faculty of law of the Ontario universities, and one other member of the teaching staff of each faculty.

Chairman: Dean H.W. Arthurs, Osgoode Hall Law School, York University (1974).

10. *Committee of Finance Officers — Universities of Ontario*

Task: (a) To provide a medium for communication and cooperation among financial and business officers of the provincially assisted universities of Ontario so

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as to promote discussion among members, initiate and study matters of mutual interest, and provide collective advice to members on all matters pertaining to university finance and business operations and planning; (b) to provide advice, and to consider, investigate and report when requested, on financial and other related matters to the Council of Ontario Universities, its committees and other appropriate organizations.

Membership: The membership of the Committee shall comprise one senior financial officer from, and appointed by, each of the provincially assisted universities.

Chairman: Mr. A.K. Adlington, Vice-President (Administration and Finance), University of Western Ontario.

11. Council of Deans of Arts and Science of the Ontario Universities

Task: To promote the welfare of Ontario universities, particularly their faculties of Arts and Science, through study and discussion of matters of common interest.

Membership: The deans or equivalent officers of Ontario institutions having university status.

Chairman: Dean C.P. Gravenor, Faculty of Science and Mathematics, University of Windsor.

12. Ontario Council of Directors of University Schools of Physical Education

Task: (a) To promote the advancement of professional preparation in the fields of physical, recreation and health education, and related programmes, in the universities of Ontario; (b) to consider matters referred to it by the Council of Ontario Universities; (c) to advise COU on any appropriate aspects of the fields of the Council's concern; (d) to provide for Ontario universities a medium of communication about and a forum for discussion of matters relating to these fields; (e) to cooperate with other agencies related to the fields of health, physical education and recreation to provide the best possible services to the community in the Province of Ontario.

Membership: Membership shall include a representative from each university which is represented on the Council of Ontario Universities and which grants a degree in physical, recreation or health education. The representative shall be the head of the department or school in which the degree programme is offered or his delegate.

Chairman: Dr. J.V. Daniel, Director, School of Physical & Health Education, University of Toronto.

13. Ontario Council of University Health Sciences

Task: (a) To provide an effective means of coordination of effort through a regular medium of communication between health science faculties and schools of universities of Ontario; (b) to provide a forum for discussion of problems of mutual interest; (c) to advise COU on matters which will influence health science education and research; and to advise on membership of the Ontario Council of University Health Sciences; (d) to consider such matters as may be referred to it by COU; (e) to serve in a liaison capacity between the schools and faculties represented on it and other agencies offering educational programmes for allied health personnel.

Membership: (a) A health sciences faculty or school shall be defined initially as a faculty or school of Medicine, Dentistry, Pharmacy, Nursing, Hygiene, Optometry

and Veterinary Medicine; (b) the senior executive officer of each such faculty or school or his appointed delegate shall be a member of the Ontario Council of University Health Sciences; (c) in addition, each university having a health sciences centre, the Vice-President, Health Sciences, (Vice-Principal, Health Sciences), shall be a member of the Council, and where no such office exists, the president of that university may appoint one other member of the Council. For this purpose a health science centre shall be defined as a group of two or more health science faculties or schools within a university.

Chairman: Dean D.G. Howell, Ontario Veterinary College, University of Guelph.

14. *Ontario Committee on Student Affairs*

Task: (a) To contribute to the professional activity and growth of persons engaged in student affairs work in the Ontario universities, by exchanging information regarding development and research taking place in this area; (b) to engage in any activity which the Council of Ontario Universities may wish to refer to the Committee in regards to the general welfare of students; liaison with student governments; residences and off-campus housing; foreign student services; psychological counselling; health services; student financial aid; placement and career counselling; athletics and recreation; discipline; cultural affairs; chaplains; and other aspects of student services.

Membership: One senior student affairs officer from, and designed by, each of the provincially assisted universities of Ontario.

Chairman: Mr. P. Gilmor, Provost, University of Guelph.

15. *Association of Deans of Education in Ontario Universities*

Task: (a) To provide an effective means of communication and cooperation among the Faculties and Colleges of Education in the universities of Ontario on matters of common concern; (b) to advise the Council of Ontario Universities on matters of common concern in teacher education programmes, research and certification of teachers and to consider matters referred to it by COU; (c) to provide an effective means of communication and cooperation among the Faculties and Colleges of Education in the universities of Ontario for liaison with the Ontario Teachers' Federation and its affiliates; (d) to provide an effective means of liaison and advice to the Ministry of Education on all matters concerning teacher education in universities.

Membership: The Dean or Acting Dean of each Faculty or College of Education in the universities of Ontario.

Chairman: Dean E.M. Stabler, Althouse College, University of Western Ontario.

16. *Ontario Association of Schools and Departments of Architecture*

Task: (a) To promote cooperation between the Schools and Departments of Architecture in the provincially assisted universities of Ontario, and between them, the Council of Ontario Universities, and the Ontario Association of Architects, and generally, to work for the improvement of architectural education in the Province.

Membership: (a) The Directors of Schools of Architecture and the Chairmen of Departments of Architecture in the provincially assisted universities of Ontario; (b) one colleague, appointed by each School or Department.

Chairman: Professor D. Shadbolt, Director, School of Architecture, Carleton University.

Committees, Boards and Affiliates

17. Association of Computer Services Directors

Task: (a) To provide a medium of communication among the directors of university computing facilities in Ontario; (b) to provide the Council of Ontario Universities and other interested bodies advice on matters related to information processing at universities and colleges; (c) to assist the Office of Computer Coordination in the implementation of cooperative projects and endeavours in the field of information processing at universities.

Membership: (a) One representative from each university or degree-granting institution in Ontario, who is normally the director of an academic computing centre; (b) the director of the York-Ryerson Computing Centre; (c) the director of the Office of Computer Coordination of COU; (d) additional members as elected by the membership.

Chairman: Dr. J.C. Wilson, Director, Computer Centre, University of Toronto.

18. Committee of Deans and Directors of Ontario Schools of Social Work

Task: (a) To promote communication, cooperation and coordination amongst Schools of Social Work in Ontario; (b) to maintain liaison with government bodies, Colleges of Applied Arts and Technology, and other appropriate organizations; (c) to advise COU on matters affecting Schools of Social Work especially in improving resources for social work education in all Schools of Social Work in Ontario.

Membership: The Committee is composed of the Deans and Directors or Acting Deans and Acting Directors of each School of Social Work associated with a university in the province of Ontario plus one faculty member selected by each school. Others may be admitted from time to time by a majority vote of the Committee.

Chairman: Dr. B.G. Gelin, Director, School of Social Work, Laurentian University.

19. Committee of Ontario University Music Administrators

Task: (a) To serve as a medium of communication and to facilitate the sharing of ideas among the Faculties and Departments of music in the Universities of Ontario; (b) to advise the Council of Ontario Universities on matters concerning music at the university level.

Membership: (a) The heads of all Ontario University academic programmes in music (whether full professional degree programmes or individual courses accredited towards a degree) shall be eligible for Full Membership; (b) associate membership is available for those in charge of concerts or other extra-curricular musical activity at Universities which do not as yet have accredited courses or degree programmes in music; (c) each institution shall have one representative whether full member or associate.

Chairman: Professor R. Tremain, Department of Music, Brock University.

20. Operations Planning and Analysis Group

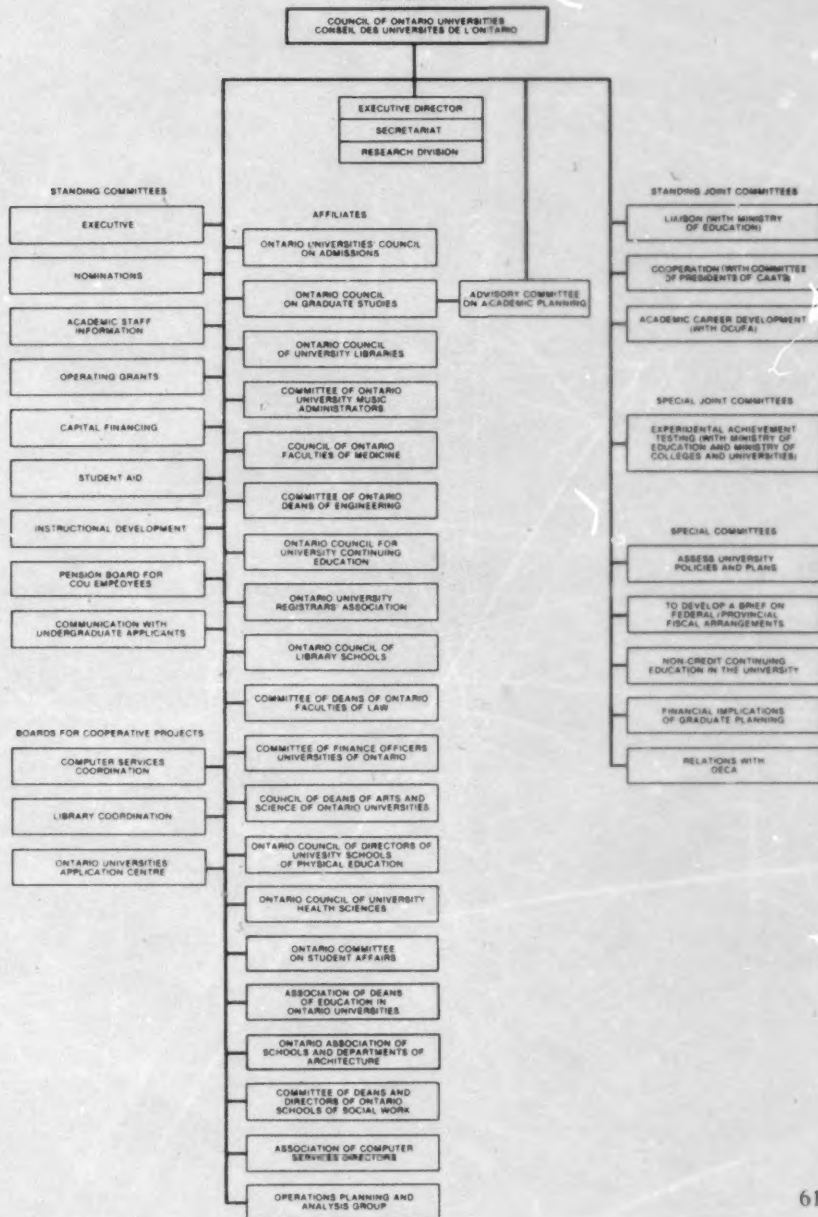
Task: (a) To stimulate and foster the exchange of information on technology and issues relevant to planning and analysis in post-secondary education in Ontario. The organization seeks to develop and maintain service in the following areas: (1) an information clearing-house; (2) seminars and meetings on current and long-range topics; (3) cooperative studies between and among post-secondary institutions; (4) committees and task forces related to province-wide issues.

Membership: Membership is on an institutional basis.

Chairman: Dr. E.C. Higbee, Director, Office of Institutional Research, McMaster University.

APPENDIX D

ORGANIZATION OF THE COUNCIL OF ONTARIO UNIVERSITIES
DECEMBER 1, 1975



APPENDIX E

FINANCIAL STATEMENTS

Note:

The following tables are simplified summaries of the information contained in auditor's statements, which are available on request. Certain adjustments were necessary for the sake of year-to-year comparability in the summaries. For the period July 1, 1972 to January 1, 1974, the auditor's statements are those of the Council of Ontario Universities, and from January 2, 1974 to June 30, 1975, those of C.O.U. Holdings Limited which was incorporated to manage the business affairs of the Council.

COUNCIL OF ONTARIO UNIVERSITIES GENERAL OPERATIONS SUMMARY OF INCOME AND EXPENDITURES FOR THE FISCAL YEARS 1972-73, 1973-74, 1974-75

	1972-73	1973-74	1974-75
INCOME			
University membership subscriptions	\$703,650	\$731,338	\$732,795
Prov. of Ontario-Advisory Committee on Academic Planning	122,992	89,139	54,426
Sundry	2,683	4,781	12,212
Total income	<u>829,325</u>	<u>825,258</u>	<u>799,433</u>
EXPENDITURE			
Administration and research	337,013	343,154	322,207
Office of Computer Coordination	112,069	46,281	26,818
Office of Library Coordination	7,479	58,274	63,279
Interuniversity Transit System	87,795	103,276	102,514
Advisory Committee on Academic Planning	265,698	321,495	171,182
Affiliate organizations, etc.	7,157	360	1,155
Ontario Universities' Application Centre	65,000		
Total expenditure	<u>882,211</u>	<u>872,840</u>	<u>687,155</u>
Surplus (Deficit) on the year	(52,886)	(47,582)	112,278
Surplus (Deficit) beginning of year	18,799	(34,087)	(81,669)
Surplus (Deficit) end of year	<u>\$(34,087)</u>	<u>\$(81,669)</u>	<u>\$ 30,609</u>

COUNCIL OF ONTARIO UNIVERSITIES
SELF-SUPPORTING ACTIVITIES
SUMMARY OF INCOME AND EXPENDITURES FOR THE FISCAL YEARS 1972-73, 1973-74, 1974-75

	1972-73			1973-74			1974-75		
	Surplus (Deficit) beginning of year	Income	Expenditures	Surplus (Deficit) end of year	Income	Expenditures	Surplus (Deficit) end of year	Income	Expenditures
Office of Computer Coordination	\$11,309	\$ 88,000	\$104,817	\$ (5,508)	\$ 98,022	\$ 88,075	\$ 4,439	\$ 104,132	\$ 103,152
Office of Library Coordination	15,749	25,623	35,944	5,428	106,492	69,257	42,663	524,957	568,243
Ontario Universities' Application Centre									
Undergraduate		255,981	295,288	(39,307)	333,974	322,121	(27,454)	371,040	374,467
Application Service									
Medical Schools					43,653	49,326	(5,673)	117,147	106,650
Application Service									
Programme for									
Instructional					45,255	45,752	(497)	5,831	5,350
Development									
Architecture									
Study Group								17,000	14,414
Canadian Associa- tion of Graduate Schools					210		210	6,459	6,325
Ontario Council on Graduate Studies									
Appraisals	2,200	27,750	20,996	8,954	27,270	31,723	4,501	36,450	61,220
Committee	\$29,258	\$397,354	\$457,045	\$ (30,433)	\$654,876	\$606,254	\$18,189	\$1,183,016	\$1,239,821
TOTAL									

(20,269)
\$38,616)

APPENDIX F

PUBLICATIONS AND REPORTS IN PRINT OF THE COUNCIL OF ONTARIO UNIVERSITIES AND ITS AFFILIATES

<i>Number</i>	<i>Title</i>	<i>Price</i>
62-1	Post-Secondary Education in Ontario, 1962-70 (1962) 44 pages	\$1.00
63-1	The Structure of Post-Secondary Education in Ontario (1963) 30 pages	\$1.50
65-1	The City College (1965) 15 pages	\$1.00
65-2	University Television (1965) 28 pages	\$1.00
66-1	From the Sixties to the Seventies: An Appraisal of Higher Education in Ontario (1966) 101 pages	\$2.00
66-2	The Health Sciences in Ontario Universities: Recent Experience and Prospects for the Next Decade (1966) 26 pages	\$1.00
67-1	System Emerging: First Annual Review (1967) 59 pages	Gratis
67-2	Brief to the Committee on University Affairs (1967) 38 pages	Gratis
68-1	Collective Autonomy: Second Annual Review (1968) 65 pages	Gratis
68-4	Brief to the Committee on University Affairs (1968) 40 pages	Gratis
69-1	Campus and Forum: Third Annual Review (1969) 73 pages	Gratis
69-2	Brief to Committee on University Affairs (1969) 54 pages	Gratis
69-4	Survey of Citizenship of Graduate Students enrolled in Master's and Doctoral Degree Programs at Ontario Universities in 1969-70 (with comparative statistics for 1968-69) 24 pages	Gratis
69-5	Final Report and Recommendations on Regional Computing Centre Development (1969) 8 pages	Gratis

<i>Number</i>	<i>Title</i>	<i>Price</i>
69-6	Brief of the Structure and Operation of the Operating Grants Formula for the Provincially Assisted Universities of Ontario 1967-68 thru' 1969-70 (1969) 22 pages	Gratis
70-1	Undergraduate Engineering Enrolment Projections for Ontario 1970-80 (1970) (study group on engineering in Ontario) 72 pages	\$1.00
70-2	An Analysis of Projections of the Demand for Engineers in Canada and Ontario, and an Inquiry into Substitution between Engineers and Technologists (1970) (study group on engineering in Ontario) 64 pages	\$1.00
70-3	A Method for Developing Unit Costs in Education Programs (1970) 65 pages (study group on engineering in Ontario)	\$1.00
70-4	Ring of Iron: A Study of Engineering Education in Ontario (1970) 154 pages (study group on engineering in Ontario)	\$2.00
70-5	Variations on a Theme: Fourth Annual Review (1970) 77 pages	Gratis
70-6	The First Three Years of Appraisal on Graduate Programmes (1970) 17 pages (Ontario Council on Graduate Studies)	\$.50
70-7	Brief to the Committee on University Affairs (1970) 47 pages	Gratis
70-11	Aims and Objectives of Emerging Universities (1970) 14 pages	Gratis
70-14	Citizenship of Academic Staff within Discipline Groups by University 1969-70 (1970) 5 pages	Gratis
70-15	Survey of Employment of Ontario PhD Graduates 1964-69 (1970) 30 pages	Gratis
70-16	Report to the Ontario Council on Graduate Studies of the Committee on Student Financial Support (1970) 59 pages	Gratis
70-17	Report of the Task Force on Computer Charging (1970) 58 pages	Gratis
70-18	Specialized Manpower Production and Research Development in Ontario Faculties of Medicine 1969-75 (1970) 92 pages	Gratis
70-19	Television and Technology in University Teaching (published jointly with CUA) (1970) 84 pages	Gratis
70-21	Report on Agreements between Universities and the Department of Education concerning Colleges of Education (1970) 7 pages	Gratis

Publications and Reports in Print

<i>Number</i>	<i>Title</i>	<i>Price</i>
70-22	Analysis of Section Sizes, Fall 1969 (1970) 29 pages	Gratis
71-1	Methodology of Section Size Analysis (1971) 18 pages	Gratis
71-2	Supplement No. 1 to the Survey of Employment of Ontario PhD Graduates, 1964-1969 (1971) 7 pages	Gratis
71-7	Financing University Programs in Education (published jointly with the CUA) (1971) 76 pages	Gratis
71-8	Ontario Universities' Application Centre: A Study of the Needs and Design of a Centre for Applications for Admission to the Universities of Ontario (1971) 49 pages	Gratis
71-9P	Towards 2000 (1971) 176 pages # 0-7710-0150-5	\$3.95
71-10	Accessibility and Student Aid (1971) 150 pages	\$2.50
71-11	Appendix A to Accessibility and Student Aid (1971) 165 pages	Gratis
71-12	A Comparative Analysis of University Calendar Systems (Brief to OCUA) (1971) 49 pages	Gratis
71-13	Statement by the Council of Ontario Universities and Responses by Committee of Ontario Deans of Engineering, Ontario Council on Graduate Studies, Association of Professional Engineers of Ontario to <i>Ring of Iron: A Study of Engineering Education in Ontario</i> (1971) 98 pages	\$1.00
71-14	Graduate Enrolments in Relation to Requirements for Academic Staff in Ontario Universities (Brief to CUA) (1971) 51 pages	Gratis
71-15	Participatory Planning: Fifth Annual Review (1971) 90 pages	Gratis
72-1	Frontiers in Course Development: System and Collaboration in University Teaching, Report of the Conference on Teaching University Biological Sciences, Jackson's Point, Ont., May, 1971 (1972) 121 pages	Gratis
72-2	Total Revenue and Expenses for Provincially Assisted Universities of Ontario for the Fiscal Year ended June 30, 1971 (1972) 97 pages	\$10.00
72-3	Post-Doctoral Education in Ontario Universities 1969-70 (1972) 75 pages	Gratis

<i>Number</i>	<i>Title</i>	<i>Price</i>
72-4	Canadians Engaged in Post-Doctoral Studies in other Countries, 1969-70 (1972) 11 pages	Gratis
72-5	Interim Report on the Review of the Ontario Operating Grants Formula (1972) 24 pages	Gratis
72-7	Responses to the Draft Report of the Commission on Post-Secondary Education in Ontario (1972) 45 pages	Gratis
72-8	"The Ten O'Clock Scholar?" What a Professor Does for His Pay (1972) 14 pages	Gratis
72-9	Building Blocks: Background Studies on the Development of a Capital Formula for Ontario Volume I: Report of the Task Force — Space and Utilization (1972) 186 pages	\$6.00
72-10	Building Blocks: Volume III: Report of the Task Force — Space for Health Sciences (1972) 72 pages	\$3.00
72-11	Building Blocks: Volume II: Report of the Task Force — Space for Education (1972) 48 pages	\$2.00
72-12S	Building Blocks: Supplement to Volume IV (1972) (Elemental Cost Analysis and Performance and Statistical Data — tables) 160 pages	\$5.00
72-14	Guide to Ontario University Libraries (1972) 135 pages	\$5.00
72-15	Total Revenue and Expenses for Provincially Assisted Universities of Ontario for the Ten-Month Fiscal Period Ended April 30, 1972 (1972) 89 pages	\$10.00
72-16	Preliminary Budget Forecasts for Provincially Assisted Universities of Ontario for the Fiscal Year Ended April 30, 1973 (1972) 72 pages	\$10.00
72-17	Stability for Planning (Brief to CUA) (December, 1972) 14 pages	Gratis
72-18	Stimulus and Response: Sixth Annual Review (1972) 80 pages	Gratis
73-1	**Perspectives and Plans for Graduate Studies: Volume I. Library Science 1972 (1973) 169 pages	\$5.00
73-2	Total Revenue and Expenses for Provincially Assisted Universities of Ontario for the Fiscal Year Ended April 30, 1973 (1973) 93 pages	\$10.00

Publications and Reports in Print

<i>Number</i>	<i>Title</i>	<i>Cost</i>
73-3	Preliminary Budget Forecasts for Provincially Assisted Universities of Ontario for the Fiscal Year Ended April 30, 1974 (1973) 73 pages	\$10.00
73-4	Response to the Report of the Commission on Post-Secondary Education in Ontario (1973) 28 pages	Gratis
73-5	Stability: A Continuing Issue (Brief to CUA) (1973) 23 pages	Gratis
74-1	Building Blocks: Volume V: Report of the Task Force — Building Life Costs (1974) 144 pages	\$5.00
74-2	**Perspectives and Plans for Graduate Studies Volume 2. Education 1973 (1974) 179 pages	\$5.00
74-3	**Perspectives and Plans for Graduate Studies: Volume 3. Economics 1973 (1974) 197 pages	\$5.00
74-4	**Perspectives and Plans for Graduate Studies: Volume 4. Geography 1973 (1974) 131 pages	\$5.00
74-5	**Perspectives and Plans for Graduate Studies: Volume 5. Chemistry 1973 (1974) 168 pages	\$5.00
74-6	**Perspectives and Plans for Graduate Studies: Volume 6. Solid Earth Science 1973 (1974) 161 pages	\$5.00
74-7	Application Statistics 1973 (April, 1974) 31 pages	Gratis
74-8	**Perspectives and Plans for Graduate Studies: Volume 7. Sociology 1973 (1974) 215 pages	\$5.00
74-9	The Ontario Operating Grants Formula: A Statement of Principles to the Ontario Council on University Affairs (1974) 51 pages	Gratis
74-10	**Perspectives and Plans for Graduate Studies: Volume 8. Anthropology 1974 (1974) 71 pages	\$3.00
74-11	**Perspectives and Plans for Graduate Studies: Volume 9. Political Science 1974 (1974) 269 pages	\$5.00
74-12	**Perspectives and Plans for Graduate Studies: Volume 10. Physical Education, Kinesiology, and Related Areas 1974 (1974) 160 pages	\$5.00
74-13	**Perspectives and Plans for Graduate Studies: Volume 11A. Chemical Engineering 1974 (1974) 221 pages	\$5.00

<i>Number</i>	<i>Title</i>	<i>Cost</i>
74-14	**Perspectives and Plans for Graduate Studies: Volume 11B. Electrical Engineering 1974 (1974) 259 pages	\$5.00
74-15	**Perspectives and Plans for Graduate Studies: Volume 11C. Metallurgical and Materials Engineering 1974 (1974) 213 pages	\$5.00
74-16	Ontario Universities' Application Centre: The First Three Years 1971-74 (1974) 47 pages	Gratis
74-17	Total Revenue and Expenses for Provincially Assisted Universities of Ontario for the Fiscal Year ended April 30, 1974 (1974) 90 pages	\$10.00
74-18	Preliminary Budget Forecasts for Provincially Assisted Universities of Ontario for the Fiscal Year ended April 30, 1975 (1974) 70 pages	\$10.00
74-19	Inflation and the Formula (Brief to OCUA) (1974) 24 pages	Gratis
74-20	Capital Financing: Funding by Formula and Cyclic Renewal (Brief to OCUA) (1974) 13 pages	Gratis
74-21	**Perspectives and Plans for Graduate Studies: Volume 11D. Mechanical Engineering 1974 (1974) 133 pages	\$5.00
74-22	**Perspectives and Plans for Graduate Studies: Volume 11E. Industrial Engineering and System Design 1974 (1974) 152 pages	\$5.00
74-23	**Perspectives and Plans for Graduate Studies: Volume 12. Religious Studies 1974 (1974) 103 pages	\$5.00
74-24	**Perspectives and Plans for Graduate Studies: Volume 13. Planning and Environmental Studies 1974 (1974) 146 pages	\$5.00
74-25	Graduate Student Incomes in Ontario, 1972-73 (1974) 25 pages	Gratis
74-26	University Students with a CAAT Background (1974) 23 pages	Gratis
75-1	**Perspectives and Plans for Graduate Studies: Volume 14. Physics and Astronomy 1974 (1975) 225 pages	\$5.00
75-2	**Perspectives and Plans for Graduate Studies: Volume 15. History 1974 (1975)	\$5.00
75-3	Equity for Ontario's Universities (Brief to OCUA) (1975) 27 pages	Gratis

Publications and Reports in Print

<i>Number</i>	<i>Title</i>	<i>Cost</i>
75-4	Graduate Student Incomes in Ontario, 1973-74 (1975) 22 pages	Gratis
75-5	**Perspectives and Plans for Graduate Studies: Volume 16. Biophysics 1974 (1975) 47 pages	\$3.00
75-6	The Status of Women in the Ontario Universities (1975) 20 pages	\$2.00
75-7	A Comparison of Graduate Student Incomes in Ontario 1972-73 and 1973-74 (1975) 11 pages	Gratis
75-8	Graduate Studies: A Brief to the Ontario Council on University Affairs. (1975) 7 pages	Gratis
75-9	Report from the Committee on Capital Financing: Cyclic Renewal and the Special Problem of Equipment (Brief to OCUA) (1975) 9 pages	Gratis
75-10	Teaching and Learning: An Evaluation of the Ontario Universities Programme for Instructional Development. (1975) 89 pages	\$3.50
75-11	**Perspectives and Plans for Graduate Studies: Volume 11F. Civil Engineering. (1975) 303 pages	\$8.00
75-12	Post-Doctoral Education in the Ontario Universities. (1975) 67 pages	\$2.00
75-13	UNICAT/TELECAT: A Report of the Cooperative Use of a Computer-based Cataloguing Support System. (1975) 208 pages	\$10.00
75-14	Total Revenue and Expenses for the Provincially Assisted Universities of Ontario for the Fiscal Year Ended April 30, 1975 (1975) 92 pages	\$10.00

** Perspectives and Plans for Graduate Studies: Advisory Committee on Academic Planning, Ontario Council on Graduate Studies, a series of reports on graduate studies.

APPENDIX G

APPRAISALS COMMITTEE REPORT 1969-70 to 1974-75

In the period September 1, 1969 - August 31, 1975, 124 proposals for new graduate programmes or extensions of existing programmes into new fields were submitted to the Appraisals Committee. Of these proposals, 120 went through the complete appraisals process, with the following results:

		%
PhD programmes approved to commence without delay	32	74
PhD programmes approved with a one-year delay	8	19
PhD programmes approved with a two-year delay	1	2
PhD programmes refused approval	2	4
	43	100
Master's programmes approved to commence without delay	63	82
Master's programmes approved with a one-year delay	10	13
Master's programmes refused approval	4	5
	77	100

One PhD and three Master's programmes were withdrawn following receipt of unfavourable reports from the consultants named by the Appraisals Committee.

This brief breakdown of programmes approved or refused does not, however, convey the complete picture of the activities and role of the Appraisals Committee. Seven programmes, for example, received approval only after an initial refusal and subsequent rebuttal and reappraisal. In nine of the programmes that received approval, one or more of the proposed areas of study were refused. Finally, in at least 48 of the 114 approved programmes (42%), approval was given with certain restrictions or with the guarantee that certain conditions would be met. These restrictions or conditions include: time limitations and the obligation to submit programmes for early review or reappraisal; the submission of progress or situation reports; increases in faculty strength through new appointments or re-allocation of faculty responsibilities; limitations on student enrolment; improving of library holdings and departmental resources; closer determination or delimitation of areas of study and programmes; strengthening of regulations and requirements within a programme.

Many of these recommendations or requirements arise from the consultants' reports which, in fact, frequently result in substantial changes and improvements being made to programme proposals before they are brought to appraisal in their final form. Others, it must be said, are prompted by the Appraisals Committee's own experience and are aimed at maintaining uniformity of standards at a high level.

An increasingly important element of the work of the Appraisals Committee is the examination of Five-Year Reports, presumably to be followed soon by Ten-Year Reports and re-appraisals of approved PhD programmes. In its review the Committee has endeavoured first of all to obtain assurance that programmes are conforming to what was laid down at the time of original appraisal, and have progressed according to

Appraisals Committee Report

expectations. It should be emphasized that these reviews have frequently resulted in requests from the Committee for supplementary information and occasionally meetings with the graduate deans and officers of the departments involved. Indeed, some reviews have taken as much — if not more — of the Committee's attention as have regular appraisals.

APPENDIX H

ACAP PLANNING STUDIES

A PLANNING ASSESSMENTS

Completed	
Library Science	1972
Education	1973
Economics	1973
Geography	1973
Chemistry	1973
Solid Earth Science	1973
Sociology	1973
Political Science	1974
Physical Education, Kinesiology, and Related Areas	1974
Engineering	
Chemical Engineering	1974
Electrical Engineering	1974
Metallurgical and Materials Engineering	1974
Mechanical Engineering	1974
Industrial Engineering and Systems Design	1974
Civil Engineering	1974/75
Religious Studies	1974
Planning and Environmental Studies	1974
Physics and Astronomy	1974
History	1974
In Progress	
Administration, Business and Management Science	
Mathematical Sciences	

B. OTHER STUDIES

Completed	
Criminology	1972
Journalism	1973
Landscape Architecture	1973
Fine Arts (Dance, Film, Drama and Theatre)	1974
Recreation and Recreationology	1974
Anthropology	1974
Biophysics	1974
In Progress	
Fine Arts (Visual Arts, Music)	

APPENDIX I

ACTIVITIES OF THE COU RESEARCH DIVISION

The Research Division of the Secretariat provides staff research support to the Council and its various committees. This support usually involves drafting working papers, developing analytical models, coordinating research, collecting and analysing data, and editing final drafts of publications.

During the period 1972-75, work continued in support of operating and capital finance planning and analysis, financial reporting, faculty studies, and providing for improved academic staff information, applications and admissions analysis, various student studies, financial aid to students, and other studies. The results of the work frequently culminated in the publication of relevant reports listed in Appendix F. Following are brief descriptions of the research under the appropriate headings.

Operating Finance Planning and Analysis

Research staff support was provided to aid the COU Committee on Operating Grants in the development of briefs to the Committee on University Affairs and the Ontario Council on University Affairs. During the period December, 1972 through May, 1975, COU presented four such briefs. These stressed perceived needs of universities for improved relations between COU, the buffer body and the Ministry, the need for income stabilization, cost pressures and the impact of inflation on universities, principles that should be observed in making revisions to the operating grants formula, and the need for equity for Ontario's universities.

The briefs are published by COU under the following headings:

Equity for Ontario's Universities, May, 1975

Inflation and the Formula, October, 1974

Stability: A Continuing Issue, December, 1973

Stability for Planning, December 1972

There was continuing work on review of the Ontario operating grants formula. This work had resulted earlier in an interim report documenting the historical background of the formula and the main issues which would have to be considered prior to revising the formula. Various working papers and analytical models were developed to assist in continuation of the review.

Another publication arising out of this review was the COU *Statement of Principles to the Ontario Council on University Affairs*, June, 1974. This statement contained four exhibits: 1) a possible model for revision of the operating grants formula; 2) indexing of university costs; 3) funding mechanisms; and 4) proposals for dealing with government requests for information.

A study was made of the level of Ontario's contributions to its university system in relation to the other nine Canadian provinces. This study resulted in a working paper entitled *A Comparison of Provincial Contributions to Canadian Universities*, November, 1975. It is expected that this study will be conducted annually in the future.

Associated with this study was analysis of the implications to universities of insufficient operating funds leading to the preparation of a research working paper on *Changes in University Expenditure Patterns: Analysis of Experience in the Period 1970-71 through 1973-74, with Some Scenarios for the Following Decade*, August, 1975.

Capital Finance Planning and Analysis

Staff support was provided to the COU Committee on Capital Financing in the development of briefs to the Committee on University Affairs and the Ontario Council on University Affairs. The briefs listed below stressed among other things, Ontario university requirements for cyclic renewal funds and the inadequacy of present funding levels.

A brief entitled *Capital Financing: Funding by Formula and Cyclic Renewal*, October 1974 was developed to review the history of the capital financing of Ontario universities, to consider the elements of a satisfactory formula, to assess the current situation and the implications of a continuance of the capital freeze and to make some recommendations concerning future action.

Other reports relating to space planning and funding produced by the Committee on Capital Financing were:

Report of the Subcommittee, Space Coding to the Committee on Capital Financing, September 1975

Report from the Committee on Capital Financing: Cyclic Renewal and the Special Problem of Equipment, August 1975

Ontario University Requirements for Cyclic Renewal Funds, November, 1973.

In addition, staff support was provided to a subcommittee of the Committee of Capital Financing leading to a report recommending the standards contained in *Building Blocks* in preference to OUPRS standards, *Review of Recommendations Contained in the Ontario Universities Physical Resources Study with Summarized Responses from Individual University Submissions*, April, 1974.

Financial Reporting

Support was provided to the Committee of Finance Officers — Universities of Ontario in the preparation of reports on total revenue and expenses and preliminary budget forecasts. These reports contain guidelines and definitions, reports on operating revenue by source and by type of fund, operating expenses by type of fund and object of expense. Tables are presented showing summaries for all universities and for each university. There are annual reports of preliminary budget forecasts covering the fiscal years ending April 30, 1973, 1974, and 1975.

A COFO-UO manual, *A University Programme Costing Manual*, February, 1973 was developed to illustrate new procedures for presentation and examination of university financial information.

Faculty Studies

In 1973 the Select Committee on Economic and Cultural Nationalism of the Ontario Legislative Assembly requested information on the citizenship of academic staff in Ontario universities. Since the issue of citizenship and privacy was extremely sensitive, it was decided to apply procedures to the data designed to remove identifiability of individuals or very small groups of individuals. As Statistics Canada was unable to undertake this exercise, the raw data were forwarded to COU and the Research Division applied Statistics Canada procedures to protect privacy in the preparation of reports which were then forwarded to the Select Committee.

Also, extensive research was undertaken, in cooperation with the Ontario Confederation of University Faculty Associations, on the utility of early retirement as a

Activities of the COU Research Division

means of providing some financial relief to strained university budgets. This research culminated in a report to COU in February, 1974, *Report on the COU/OCUFA Joint Study of Early Retirement Options*, continuing work on faculty hiring and renewal practices, a study of academic staff hiring and renewal practices, and a preliminary report on academic career development prospects in Ontario universities over the next decade, *Some Notes on Academic Career Development Prospects for Ontario Universities Over the Next Decade*, September, 1975.

The Research Division provides a support function to the COU Committee on Academic Staff Information. In 1972 COU agreed to the committee's recommendation to refrain from establishing a central file of academic staff data in Ontario and, instead, to utilize the data maintained by Statistics Canada. The committee has held a number of discussions with Statistics Canada and has suggested changes in the data elements and definitions employed by Statistics Canada as well as the reporting of academic staff salary data.

Applications and Admissions Analysis

In May 1973 the COU Executive considered a proposal to survey universities for information on student enrolment in professional programmes with enrolment restrictions, namely, the health sciences and law. The originally planned full-scale survey was not launched, but a preliminary study (unpublished) indicated that more information was needed on the procedures used to select applicants to professional schools. A detailed study of applicants to Ontario law schools was begun late in 1974. A study of applicants to Ontario medical schools was started late in 1975 with the help of the Ontario Medical School Application Service. Both of these studies should be completed in 1976.

In 1974 the Research Division, in cooperation with the Application Centre, prepared the first in a series of annual reports on application and registration patterns for first-year applicants to the Ontario universities in the fall of 1973. The report, *Application Statistics 1973*, April 1974, presents detailed information on yield ratios of registered applicants to applications, university and programme choice preferences, the educational experience of non-Grade 13 applicants, the geographic origin of applicants and registrants, and applicants' age, sex, citizenship and immigration status. Work is presently underway on the subsequent reports.

Student Studies

Annual undergraduate scholarship surveys arise out of a project conducted in 1973 for the Council of Ontario Universities Special Committee on Undergraduate Scholarship Policy. This committee was charged with the task of making recommendations to control the potential use of scholarships as a competitive recruiting device. The data gathered by the Committee have proved to be of value to individual universities when formulating scholarship policies and when receiving bequests. The fact of the disclosure of awards made may also have helped to achieve the goals set when the Special Committee was established. COU, when dissolving the Committee, requested that a survey of awards made to undergraduate students in Ontario universities be conducted annually. This has been done for every year since 1972-73, but data for only the first two years have been published as *Undergraduate Student Awards in Ontario 1972-73 and 1973-74*, February 1974.

The lack of information on graduate student support in Canada became a matter for concern in 1971 and 1972 when the agencies involved realized that they were unable to

forecast the effect of substantial changes to graduate student financing being made by the provincial government and by federal granting agencies. At that time the Council of Ontario Universities and the Ontario Council on Graduate Studies initiated a study of the financial resources of Canadian graduate students. Annual reports concerning the situation in Ontario have been prepared for the years 1972, 1973, 1974 and published under the following titles:

Financial Resources of Graduate Students in Ontario 1971-72, October 1973

Graduate Student Incomes in Ontario, 1972-73, April 1974

Graduate Student Incomes in Ontario, 1973-74, April 1975

*A Comparison of Graduate Student Incomes in Ontario, 1972-73
and 1973-74*, May 1975

Preparation of such data sources continues.

Collection of data on graduate student incomes in other provinces has proved to be a major task. A preliminary report, *Graduate Student Incomes in Universities Outside Ontario 1972-73*, October 1974, has been produced, and data collection is being extended to other Canadian universities as time and resources permit. The studies have met with favourable reaction from universities and granting agencies.

Earlier plans to collect similar data from American graduate schools have now been dropped.

During the summer of 1973 the Joint Committee on Cooperation Between Universities and Colleges of Applied Arts and Technology became interested in the academic success of students who had transferred from colleges to universities. Some months later the request for information came to the attention of the Research Division of COU and a study was initiated to compile as many data as were accessible. The initial study was limited to full-time university students who had first registered at an Ontario university for the 1973-74 academic year having attended a CAAT in any previous year.

The report, *University Students with a CAAT Background*, December 1974, documents achievement of transfer students in their first year in university. The report identifies the transfer students by university, by CAAT of last attendance, and by field of CAAT studies. Analyses by length of CAAT experience, CAAT diploma status, and basis for admission to university are presented. The academic performances for various segments of the population are shown.

In 1973 the Research Division was asked by the Canadian Association of Graduate Schools to produce its statistical report on an annual basis, commencing with the 1974 report. These annual reports, *Canadian Association of Graduate Schools Statistical Reports 1974* and 1975 present detailed statistics on graduate student enrolment, graduate degrees awarded, citizenship status and new graduate students at universities across Canada.

The Research Division conducted a survey of post-doctoral students in the Ontario universities in 1973-74 to update a similar study undertaken for 1969-70. The report, *Post-doctoral Education in the Ontario Universities 1973-74*, June 1975, presents statistics on the demographic characteristics of the post-doctoral population, on the role of the post-doctoral fellow in the university, and on the financing of post-doctoral education for both the individual fellow and the institution.

Other Research

In 1974 a presentation was made to COU by the Ontario Status of Women Council. In response, the Research Division prepared a report, *The Status of Women in Ontario Universities*, June 1975, which presented data on patterns of applications, the representations of women students at various levels, and the status of women as

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members of the academic staff. In addition, the report summarized what actions the universities have taken, are taking, or are planning to take in respect of this issue.

The Research Division has prepared for reference at the Secretariat a series of reports showing student enrolments and basic income units for the Ontario universities for the years 1971-72 to 1974-75. These reports are based on data submitted by the universities each year to MCU. The data have been computerized and tables may be generated on either a financial basis (i.e., enrolment related to funding) or on a statistical basis (i.e., actual student head count).

In June, 1975, a Tripartite Committee on Macro-Indicators was established with representatives from OCUA, COU and MCU. This committee is to develop a series of indicators at a high level of aggregation which will serve to measure the extent to which the objectives of the provincial government, and of the universities themselves, are being met and to serve as accountability measures to measure how public funds allocated to the university sector are being utilized. Throughout the process of development and implementation of the indicators, the committee will be reporting back to its parent bodies.

The graduate programme planning process in Ontario will have implications for the academic developments of the universities far beyond the easily measurable aspects such as student numbers and costs, for instance, on research programmes. The COU Research Division has been asked to assist in the formulation and implementation of projects designed to identify the extent of such problems so that appropriate recommendations might be formulated. A preliminary report on the problems facing small departments has been prepared and is being presented to the Ontario Council on Graduate Studies early in 1976.

Staff support was provided to a special Architecture Study Planning Group in the proposal and research definition stage. This led to a study report containing recommendations on planning and reorganizing university-level architecture education.